Summary

Washington and Oregon Resident Travel Study

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SUMMARY OF

WASHINGTON AND OREGON TRAVEL MARKET STUDY

Prepared by
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and
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for
Ministry of Tourism
Province of British Columbia
March 1985

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PREFACE

This study was commissioned by the Ministry of Tourism and is published to assist the public and private sectors throughout the Province in tourism development and marketing related activities.

The report is the sole responsibility of the consultants and does not necessarily reflect the opinions of the Provincial Government which funded the study.

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BACKGROUND AND OBJECTIVES

Because of their proximity to British Columbia, both Washington and Oregon have been and will continue to be important sources of expansion for the BC tourism market.

As an initial step in maximizing its ability to market British Columbia as a travel destination in Washington and Oregon, the provincial government through the Ministry of Tourism decided to update and broaden its understanding of British Columbia as a vacation destination among residents of these two states.

This update was undertaken to facilitate both the refinement of current, and the development of new, BC destination marketing and advertising strategies. These new strategies are intended to be used not only to increase BC tourism from the two states in question, but also as a key part of an overall BC marketing and advertising strategy for the entire US West Coast.

Thus, a research study was commissioned in October, 1984 by the Ministry of Tourism, designed to address the following major primary objectives:

1. to describe the current composition of the travel market in Washington and Oregon as it relates to potential British Columbia tourism in terms of:

    - types of travelers and their demographics
    - primary vacation travel patterns
    - BC penetration and competing destinations;

2. to identify the current attitudes and motivations of residents of Washington and Oregon:
    - towards travel in general and towards BC in particular
    - in terms of interest in traveling to BC and certain specific BC destinations;

3. to identify those population segments with the highest BC travel potential;

4. to assess the current BC advertising program in Washington and Oregon through the measurement of consumer awareness and recall of BC advertising.

A secondary objective of this research is to investigate the degree of development of the skiing market in Washington and Oregon, and further, to estimate current levels of residents' awareness of various ski areas in British Columbia.

METHODOLOGY

Number And Location Of Interviews

A total of 1000 telephone interviews were conducted for this study from November 17 to December 8, 1984 from central location telephone facilities in Seattle, Washington. Five hundred interviews were conducted among Washington residents and 500 interviews were conducted among Oregon residents.

Only those cities in the two states which are major population centers were included in this research, but each city was represented in its proper proportion in relation to the total population of its state.

Using this system, the following cities in the two states were accounted for by the number of interviews indicated below:

Total Number Of Interviews

WASHINGTON	#
King and Snohomish Counties (Seattle)	264
Metro Spokane	58
Metro Tacoma	81
Metro Bellingham	20
Metro Bremerton	24
Metro Tri-Cities (Richland/ Pasco/Kennewick)	24
Metro Yakima	29
Total Washington	500

OREGON	#
Metro Portland	324
Metro Eugene/ Springfield	65
Metro Salem	75
Metro Medford	36
Total Oregon	500

Respondent Qualifications

To qualify for inclusion in this study all respondents were screened to meet the following specific criteria:

1. being at least 21 years of age;
2. responsible for or sharing importantly in the household's vacation planning decisions;
3. having taken a vacation staying at least one night and traveling at least 250 miles from home (one-way) if a Washington resident, or two nights and 350 miles from home if an Oregon resident;
4. if not qualified for #3 above, then intending to take a vacation of similar proportions in the next 12 months.

While respondents from both sexes were included randomly in this survey, it is often the case that female respondents are more easily obtained than male respondents. To be sure that men were adequately represented, women were not allowed to exceed more than 60% of the total sample in either state. The final outcome was that in Washington 55% of the sample was female, and in Oregon 49% of the sample was female.

To represent a reasonable mix of all types of respondents, including working women and singles, telephoning took place only from 4PM to 9PM on weekdays and from 2PM to 9PM on Sundays.

Even though those who did not qualify as vacationers in this study were not included in the formal tabulation of the main body of results, they were tallied and included in the analysis of results where appropriate, e.g., to provide an estimate of the percent of the total market that are vacationers vs. non-vacationers.

Weighting Of The Data

The data from the results of this study have been weighted to account for the fact that a quota of 500 interviews was established for both Washington and Oregon, even though the actual populations of the areas sampled in the two states are of unequal proportions. Specifically, the population of the areas sampled in Washington is approximately 58% greater than the population of the areas sampled in Oregon.

To compensate for this intentional imbalance in the sampling plan, the data in this study have been recalculated to show results as if respondents were recruited in approximately the same proportion as the actual population of the areas sampled in the two states.

Thus, the sample sizes of 500 for each state established for this study are sufficient to make the resulting data stable and reliable, while at the same time the weighting process provides for a reflection of the marketplace in the context of its proportional reality.

# #

Notes To The Reader

The data generated by a study of this type is voluminous; to try to include all of it in tabular form in this report would produce a document not only unmanageable in size but difficult to assimilate as well. Therefore, while a great deal of summary figures are shown as support for the findings of the analysis, from time to time references are made to data that are not shown in supporting tables. However, a complete tabulation is available in the accompanying volume to this report, entitled "Tabular Summary," available for reference purposes in the Ministry of Tourism Library.

Where tabular data is shown, arrows are used to indicate those differences which may be considered statistically significant at the 90% level of confidence or greater.

Finally, references are made in this report to "short" vacations in terms of 1-6 nights away from home. Since in this study the definition of a short vacation is 1-6 nights in Washington and 2-6 nights in Oregon, for simplicity's sake only the term "1-6 nights" has been used in the narrative of this report.

The reader should therefore be advised that "1-6 nights" in this report may mean either or both "1-6 nights" or "2-6 nights," depending on the context of the discussion.

# #

EXECUTIVE SUMMARY

The following summarizes the most pertinent findings from the results of this study. For more details or a more complete analysis in any particular area, the reader should consult the Detailed Findings section in the main report (under separate cover).

A. Overall Market Composition

* About half the Washington and Oregon market is composed of "infrequent" vacationers (roughly speaking, people taking less than three vacations of any length in the past 2 years) and one-fourth are "frequent" vacationers (3 or more vacations in the past 2 years).

* The remaining one quarter of the market is roughly split between what might be called "vacation prospects" (those who have not taken a vacation recently but who intend to do so soon) and "non-vacationers" (those with neither recent vacation experience nor future vacation intentions).

* Thus, in total more than 80% of all Washington and Oregon residents could be considered "vacation-prone" tourists.

* In general, Washington is a slightly more active and fertile travel market than Oregon -- meaning a higher proportion of Washington residents take

vacations at a faster rate and spend a higher average amount of money than Oregon residents.

* There is a marked tendency for vacationers in Washington and Oregon to be skewed in favor of:
  - being in the 35 to 44 age group;
  - having a better education;
  - living in households with three or four persons;
  - having children present;
  - having incomes of $25,000 or more.

* In addition, there are as many vacationers in Washington and Oregon claiming to be hooked up to cable television as claiming to own a common backpack (58%). This suggests a rather large skew in terms of vacationers' being cable subscribers.

B. Typical Vacation Behavior

* The type of area visited by the largest proportion of Washington and Oregon vacationers is a big city, followed sharply lower in importance by the oceanside, a smaller town, a resort area, and a mountainous or wilderness area.

* When on vacation, Washington and Oregon tourists most often end up staying in a hotel or a motel; staying with friends or relatives is of secondary importance.

- Summer is the most popular period for taking a vacation, whether long or short.

- Short vacations (up to 6 nights away) are of about equal importance as long vacations (7 nights away or longer); that is, the populations of Washington and Oregon break down into approximately equivalent proportions of residents who take short vacations and long vacations.

- As one would expect, there are many more "infrequent" vacationers in the marketplace than there are "frequent" vacationers.

- Yet, within each category -- whether "frequent" or "infrequent" -- there is no predominance in terms of the length of the vacation taken. In other words, "frequent" vacationers do not appear to take shorter vacations more often, they just generally take more vacations, both short and long. Similarly, "infrequent" vacationers do not seem to take longer vacations less often, they just take fewer vacations, both short and long.

- The average short vacation is taken 2.4 times every 2 years, lasts 4 nights, is planned 2 months in advance, involves 2.7 persons, costs an average of $748, and more often is taken in a car or other road vehicle.

- The average long vacation is taken 1.7 times every 2 years, lasts 15.1 nights, is planned 3.6 months in advance, involves 2.6 persons, costs an average of $1588, and more often involves an airplane trip.

- Long vacations more often involve visiting friends, using a travel agent and renting a car than short vacations.

- Favorite non-BC destinations for Washington and Oregon vacationers (representing BC's biggest "competition") are the US West Coast, particularly California. Oregonians are particularly fond of California as a vacation destination.

C. BC Market Penetration

- BC's penetration of the Washington-Oregon market is high. Almost three-fourths of Washington and Oregon tourists claim to have ever been to BC; furthermore, a healthy majority claim to have been there three or more times. BC penetration is somewhat higher in Washington than in Oregon.

- Those who are the most likely to have taken the greatest number of and the most recent vacations to BC are:
    - "frequent" vacationers;
    - those with household incomes over $25,000;
    - those with a positive interest in traveling to BC within the next 12 months.

- By a factor of about three, BC is much more successful at attracting tourists going on short vacations than on long vacations.

- Vacationers claim that they have most often visited Vancouver and Victoria/Butchart Gardens when on vacation in BC; Southeast BC and Vancouver Island are comparatively secondary BC destinations.

D. Overall Attitudes And Motivations

- Washington and Oregon tourists are fairly optimistic about taking future vacations, particularly:
  - men;
  - those under age 35;
  - those with household incomes of $25,000 or more;
  - those with better educations;
  - households with children present;
  - those with a positive interest in traveling to BC in the next 12 months.

- The main motivations of Washingtonians and Oregonians to take a vacation are:
  - to relax (even in the context of getting out and doing things);
  - to see the sights.

- Visiting relatives can also be important, but it is more often secondary to other motivations.

- Of course, money is also an important factor to vacationers, and people certainly want to feel that they have been given their money's worth in terms of vacation expenses.

- On the other end of the scale, there appears to be very little importance attached to a rich style of living on a vacation. The mainstream of the Washington and Oregon market shows a relatively low interest in visiting a cosmopolitan city, staying in fancy accommodations, gambling, or even getting a good sun tan.

- Lest one get the impression that Washington and Oregon vacationers are exclusively low-brows, it should be noted that at the same time they eschew rich living they also overwhelmingly reject the notion of "roughing it." The average Washington and Oregon vacationer prefers neither extreme.

- Water sports dominate the list of activities that people say are important to them when on a vacation -- especially swimming, boating and fishing. This shows how important swimming pools, lakes, rivers and the ocean can be in terms of selecting a vacation destination.

E. Attitudes Toward BC

- BC is currently very highly regarded in terms of what might be called its "outdoor-ness" -- being a good place for enjoying the outdoors, visiting a national park or camping out. BC is also perceived to be a good place for being together as a family and for going to new places.

- This latter item, "going to new places," is interesting in view of the fact that so many vacationers in Washington and Oregon have already visited British Columbia. There nevertheless appears to be good recognition that many facets of BC remain to be experienced.

- On the opposite end of the spectrum are four items on which, for self-evident reasons, BC rates more poorly. Realistically, of course, there is very little BC can do to alter these particular perceptions from the point of view of Washington and Oregon tourists:
    - experiencing a change of climate;
    - visiting relatives;
    - getting a good sun tan;
    - gambling.

- But when the list of things that are important on a vacation are compared to the things on which BC is highly regarded, three items emerge which offer the greatest promise as the basis of a marketing strategy aimed at attracting visitors to BC:

- going to new places;
- enjoying the outdoors;
- being together as a family.

* Three other aspects about BC show potential for being added to the list of the three items above if vacationers' perceptions of them in connection with BC can be improved. They are:
    - getting a high value for the dollar;
    - experiencing a change of scenery;
    - feeling "invited."

* However, to avoid backfiring, BC's claims to any of these three aspects must not be laid falsely. There is evidence of a certain amount of backfiring with respect to the recently used claim "high value for the dollar."

* Either because they are relatively unimportant in consumers' minds or they are weak points for BC, appeals such as camping out, experiencing a different culture, dining at fancy restaurants, etc., do not appear to be suitable candidates to play a major role in BC's marketing programs in Washington and Oregon.

F. Travel Interest In BC

* Three-fourths of Washington and Oregon vacationers express a positive interest in taking a vacation to British Columbia within the next 12 months. This

figure is particularly impressive because about half of that number is composed of those who claim to be "very" interested in such a vacation.

- Washington vacationers tend to be a little more interested in a BC vacation than Oregon vacationers.

- Travel interest to BC cuts across a broad range of socio-economic lines. Factors such as income, household size, presence of children in the household, household ownership, and sex do not distinguish between a person who is very interested in traveling to BC and one who is not.

- At the same time, there are a few characteristics that do distinguish between a person who is very interested in traveling to BC and one who is not. As a result, BC's best prospects for a future vacation would appear to be the following:
  - those who have ever been to BC, and in particular, "frequent" BC visitors;
  - those with a positive outlook for travel in the future;
  - those oriented towards short vacations;
  - those with better educations.

- It is important to note that those who have "ever been" to BC are among the most anxious to return.

This is a positive indication for seeking repeat business from Washington and Oregon tourists. In other words, BC's best future tourist prospects are most likely to be its current customers.

* Another important finding in this study is that the factor which would appear to have the greatest effect on increasing interest in traveling to British Columbia would be to provide vacation prospects with specific information about where to go and what there is to do in BC.

* Of course, the planned major exposition in Vancouver in 1986 will almost certainly attract a great deal of tourists from Washington and Oregon. Approximately half of all respondents indicate that that event will increase their interest in taking a vacation to BC. But even Expo 86 was less powerful at increasing interest in traveling to BC than getting specific information about where to go and what to do in BC.

* Many tourists' interest in traveling to BC would also be increased by getting more information about how BC is different from what is already available at home.

* The main reason given for a lack of interest in taking a vacation to BC is that other vacation plans have already been made, or that other

destinations are preferred. Also prominently mentioned are "being too familiar" with BC or finding BC "too similar" to Washington and Oregon. Obviously, people with these kinds of reasons will not be easy to convince to go on a BC vacation.

G. Principal BC Destinations

* There are four principal BC destinations in the minds of those expressing a positive interest in taking a vacation to BC in the next 12 months:

  - Victoria;
  - Vancouver;
  - Vancouver Island;
  - Butchart Gardens.

* Ironically, these same four destinations are also at the top of the list of those that people claim to have visited most often in BC. This highly consistent pattern suggests that, as far as Washington and Oregon tourists are concerned, a vacation to BC essentially involves one or more of these "big four" destinations.

* The main reasons given for not being interested in visiting certain specific BC destinations are as follows:

  Vancouver: is often not considered a vacation destination (e.g., "I'm not interested in visiting a city"); or, to a lesser degree but in the same vein, there is "nothing of interest" in Vancouver.

Victoria and/or Butchart Gardens: many people have been to these places before and feel they have seen all there is to see there.

Vancouver Island, Whistler/Blackcomb and the Okanagan: most uninterested vacationers say they do not know enough about these destinations to be able to know whether they would want to visit them or not.

Harrison Hot Springs: Harrison Hot Springs has some market presence; nevertheless, a substantial minority of those with negative attitudes towards this destination say that there is simply nothing there (or about hot springs in general) that interests them.

BC Rockies: are perceived to be too similar to the mountains in the US. The feeling that "you've seen one mountain, you've seen 'em all" is not atypical.

H. Advertising Recall

* Although a healthy majority of vacationers claimed to recall some form of BC advertising, much of what was played back was either disappointingly general,

or worse, the probable result of guesswork (such as the recall of beautiful scenery or mountains). In addition, a noticeable portion of BC advertising recall was actually incorrect.

- Claimed recall was generally higher in Washington than in Oregon, no doubt owing to the fact that no direct advertising was done in Oregon (only a small amount of advertising in regional publications was run in Oregon, plus some unavoidable "spillover" from the Washington border).

- Unfortunately, less than one in ten respondents played back what might be termed "specifically correct" ideas from BC advertising. These were items such as the notion that your money buys a lot of value in BC or the slogan "Super, Natural."

- There is clear evidence that advertising from Canada and British Columbia is blurred in consumers' minds. A sizable portion of BC advertising recall was incorrectly derived from advertising promoting tourism in Canada, e.g., the phrase "Come On Up."

- Even on an "aided" basis where respondents were read several advertising copy points and asked if they remembered them from BC advertising, recall of the correct phrase "Super, Natural" was significantly lower than the incorrect recall of Canada's slogan "Come On Up."

I. Ski Market

- Approximately 42% of Washington and Oregon vacationers are either active skiers or are those interested enough in the sport to be considered prospective skiers. However, only about half of this group (24%) are currently active skiers.

- Both Washington and Oregon appear to have skiers and non-skiers in approximately the same proportions.

- Downhill skiing appears to be preferred to cross-country skiing by greater than a two-to-one margin. About two-thirds of Washington and Oregon skiers claim to prefer downhill skiing, whereas cross-country skiing is preferred by only about one quarter of skiers. (The remainder like both types of skiing equally.)

- Washington skiers tend to be a little more interested in downhill than Oregon skiers, while Oregon skiers show a correspondingly elevated interest in cross-country.

- Whistler/Blackcomb is the best known BC ski area by far among Washington and Oregon skiers, and it is the only BC ski area with any substantive top-of-mind ("unaided") awareness. On this basis its overall awareness may be judged to be reasonably good.

- The preponderance of Whistler's awareness emanates from Washington. In fact, awareness of almost any BC ski area is significantly higher in Washington than in Oregon (the single exception to this is Mount Washington).

- Awareness of the other BC ski areas exists almost exclusively in terms of "aided" awareness, but even so it is significantly lower than that for Whistler/Blackcomb. Apex/Alpine and Mount Washington come closest to Whistler in overall awareness among Washington and Oregon skiers.

# #

RECOMMENDATIONS

The information generated from this study indicates that the following specific actions should be considered as ways to facilitate or increase Washington and Oregon tourism to British Columbia:

* Continue to emphasize Washington somewhat more than Oregon in advertising and promotions because Washington is at the present time the more active and fertile travel market.

* For media purposes define the target market for BC tourism as vacationers with the following demographic characteristics:
  - both men and women;
  - those 35-44;
  - some college education or college degree;
  - families with children;
  - households with $25000+ income.

* Because so many Washington and Oregon vacationers have already been to BC, and because previous visitors show a greater interest in taking a future vacation to BC, concentrate on repeat business as opposed to new trial. As the saying goes, "Fish where the fish are."

* For the reasons just explained, plus the fact that for every single "long" vacationer BC attracts it

attracts three "short" vacationers, BC should establish as its primary target market:

- current frequent BC visitors;
- those oriented towards taking short vacations (1-6 nights in Washington and 2-6 nights in Oregon).

* In line with this target market definition, and because it is always easier to attract customers in ways which are consistent with already existing patterns of consumer behavior, BC should be positioned in Washington and Oregon as a destination for shorter rather than longer vacations.

* Water resources -- including swimming pools, the ocean, lakes and streams -- can be a critical factor in selecting a vacation destination. Accordingly, water and water-related activities should be included in BC's advertising and promotion materials whenever possible.

* Because vacationers generally eschew both rich-style living on vacation as well as "roughing it," care should be taken to avoid either of these extremes in characterizing or typifying a BC vacation.

* An advertising and promotional campaign based on new and interesting destinations in BC (allowing

secondary emphasis on outdoor family enjoyment) should be formulated and tested. This study provides several compelling reasons for this:

- "Going to new places" is not only an important objective for vacationers, it is also perceived as one of BC's strongest points.
- While there are two other items that also show high promise as a basis for attracting visitors to BC ("enjoying the outdoors" and "being together as a family"), "going to new places" is especially promising because it is the one item of the three that cannot be pre-empted by competing destinations. For example, California or many other places could just as well be a good place for enjoying the outdoors or being together as a family, but only BC has certain new and interesting places to see. (BC destinations are, by definition, unique.)
- "Going to new places" lends itself to an information-based campaign, dovetailing nicely with the fact that vacationers want specific information about where to go and what there is to do in BC.
- One of the most important of all motivations for taking a vacation is "to see the sights."

An advertising campaign based on seeing new and interesting places in BC (which are perfect places for the family to enjoy the great outdoors together) is a natural extension of this motivation.

- Because relatively little is known about Vancouver Island, Whistler/Blackcomb and the Okanagan, these destinations are prime candidates for profiling as "new" places to see in BC. However, there are probably myriad other possibilities in terms of BC destinations that could be highlighted in such a campaign.

- Care should be taken not to omit the "big four" as "new" and interesting BC destinations. The "big four" have been and are a large part of what people expect to visit when they vacation in British Columbia. Perhaps the "big four" can best be blended into a "new places" campaign simply by refreshing them with new and interesting angles on their traditional attractions.

- Because of the low interest expressed in this study for visiting "a cosmopolitan city," Vancouver obviously should not be positioned to prospective Washington and Oregon vacationers as a chic, worldly capital. But neither is there anything in this study that suggests that Vancouver could not fit in with a "new places" campaign. Since most people can be expected to already be somewhat familiar with Vancouver, the challenge will be to show them things about the city, or specific parts of it, that make it easy for people to figure out what they wish to see and do there.

- Thus, whenever possible, new reasons for people to visit BC should be created. Expo 86 is an obvious example of a case where a new, major reason to visit BC will exist, and it will undoubtedly provide the impetus for a great number of Washington and Oregon vacationers to visit BC. In the same vein, it makes sense to highlight special festivals, ethnic celebrations, special wildlife migrations -- almost anything -- to provide people with pertinent reasons to vacation in BC.

- In effect, let Canada communicate the emotional reasons for considering a vacation north of the border, but let BC give Washington and Oregon tourists the factual, genuine and concrete reasons for going on vacation to British Columbia.

- To combat the problem of confusion between Canadian and British Columbian advertising, devise and test future advertising to ensure that it establishes an unmistakably distinct image for BC apart from Canada. This is important because without a separate identity British Columbia may as well let Canada create the tourism it wishes to benefit from.

* Because specific information about what there is to do and see in British Columbia is of such paramount importance, consideration should be given to promoting a toll-free "800" telephone number or other convenient means to facilitate the free flow of such information to prospective BC vacationers.

* Consider improving consumer perceptions of BC in terms of "good value for the money" and "you're invited" if conditions in the future appear that such claims can be credibly made for BC without backfiring.

* Periodically track vacationers' future expectations in terms of number of vacations and vacation spending as a gauge of the health and relative viability of the Washington and Oregon marketplace. The progress of new advertising towards creating an image for BC separate and apart from Canada could also be tested at the same time.

* The ungratifyingly low recall of the phrase "Super, Natural" (much lower than the incorrect recall of Canada's slogan "Come On Up") suggests a rethinking of the true efficacy of this slogan, the way in which it was executed in the advertising, and/or

the adequacy of the weight of the advertising pressure that is currently being used in Washington and Oregon.

- In a separate research study, investigate the viability and efficacy of the strategy of showing or demonstrating how BC is different from Washington and Oregon. The feeling that BC is no different from Washington and Oregon is a potential dampener of BC tourism, and discovering how to negate this problem could be valuable for future advertising and promotional efforts.

- Because cable subscription appears to be high among vacationers, investigate cable as an alternative way to efficiently reach Washington and Oregon vacationers.

- Since awareness of Whistler/Blackcomb is much better among skiers in Washington, test the effectiveness of a special promotion in Oregon to raise awareness of Whistler as a ski destination there. Consider using Whistler/Blackcomb as a "new" ski destination in line with the "going to new places" theme.

- Finally, most but not all of Washington and Oregon skiers are interested in downhill rather than cross-country skiing. Downhill skiing should therefore be emphasized in future BC ski promotions, but not necessarily to the total exclusion of cross-country.

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BACKGROUND AND OBJECTIVES

Because of their proximity to British Columbia, both Washington and Oregon have been and will continue to be important sources of expansion for the BC tourism market.

As an initial step in maximizing its ability to market British Columbia as a travel destination in Washington and Oregon, the provincial government through the Ministry of Tourism decided to update and broaden its understanding of British Columbia as a vacation destination among residents of these two states.

This update was undertaken to facilitate both the refinement of current, and the development of new, BC destination marketing and advertising strategies. These new strategies are intended to be used not only to increase BC tourism from the two states in question, but also as a key part of an overall BC marketing and advertising strategy for the entire US West Coast.

Thus, a research study was commissioned in October, 1984 by the Ministry of Tourism, designed to address the following major primary objectives:

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OREGON	#
Metro Portland	324
Metro Eugene/ Springfield	65
Metro Salem	75
Metro Medford	36
Total Oregon	500

Respondent Qualifications

To qualify for inclusion in this study all respondents were screened to meet the following specific criteria:

1. being at least 21 years of age;
2. responsible for or sharing importantly in the household's vacation planning decisions;
3. having taken a vacation staying at least one night and traveling at least 250 miles from home (one-way) if a Washington resident, or two nights and 350 miles from home if an Oregon resident;
4. if not qualified for #3 above, then intending to take a vacation of similar proportions in the next 12 months.

While respondents from both sexes were included randomly in this survey, it is often the case that female respondents are more easily obtained than male respondents. To be sure that men were adequately represented, women were not allowed to exceed more than 60% of the total sample in either state. The final outcome was that in Washington 55% of the sample was female, and in Oregon 49% of the sample was female.

To represent a reasonable mix of all types of respondents, including working women and singles, telephoning took place only from 4PM to 9PM on weekdays and from 2PM to 9PM on Sundays.

Even though those who did not qualify as vacationers in this study were not included in the formal tabulation of the main body of results, they were tallied and included in the analysis of results where appropriate, e.g., to provide an estimate of the percent of the total market that are vacationers vs. non-vacationers.

Weighting Of The Data

The data from the results of this study have been weighted to account for the fact that a quota of 500 interviews was established for both Washington and Oregon, even though the actual populations of the areas sampled in the two states are of unequal proportions. Specifically, the population of the areas sampled in Washington is approximately 58% greater than the population of the areas sampled in Oregon.

To compensate for this intentional imbalance in the sampling plan, the data in this study have been recalculated to show results as if respondents were recruited in approximately the same proportion as the actual population of the areas sampled in the two states.

Thus, the sample sizes of 500 for each state established for this study are sufficient to make the resulting data stable and reliable, while at the same time the weighting process provides for a reflection of the marketplace in the context of its proportional reality.

A copy of the questionnaire used in this study is included in the Appendix of this report.

# #

Notes To The Reader

The data generated by a study of this type is voluminous; to try to include all of it in tabular form in this report would produce a document not only unmanageable in size but difficult to assimilate as well. Therefore, while a great deal of summary figures are shown as support for the findings of the analysis, from time to time references are made to data that are not shown in supporting tables. However, a complete tabulation is available in the accompanying volume to this report, entitled "Tabular Summary," available for reference purposes in the Ministry of Tourism Library.

Where tabular data is shown, arrows are used to indicate those differences which may be considered statistically significant at the 90% level of confidence or greater.

Finally, references are made in this report to "short" vacations in terms of 1-6 nights away from home. Since in this study the definition of a short vacation is 1-6 nights in Washington and 2-6 nights in Oregon, for simplicity's sake only the term "1-6 nights" has been used in the narrative of this report.

The reader should therefore be advised that "1-6 nights" in this report may mean either or both "1-6 nights" or "2-6 nights," depending on the context of the discussion.

# #

EXECUTIVE SUMMARY

The following summarizes the most pertinent findings from the results of this study. For more details or a more complete analysis in any particular area, the reader should consult the Detailed Findings section of this report.

A. Overall Market Composition

- About half the Washington and Oregon market is composed of "infrequent" vacationers (roughly speaking, people taking less than three vacations of any length in the past 2 years) and one-fourth are "frequent" vacationers (3 or more vacations in the past 2 years).

- The remaining one quarter of the market is roughly split between what might be called "vacation prospects" (those who have not taken a vacation recently but who intend to do so soon) and "non-vacationers" (those with neither recent vacation experience nor future vacation intentions).

- Thus, in total more than 80% of all Washington and Oregon residents could be considered "vacation-prone" tourists.

- In general, Washington is a slightly more active and fertile travel market than Oregon -- meaning a higher proportion of Washington residents take vacations at a faster rate and spend a higher average amount of money than Oregon residents.

* There is a marked tendency for vacationers in Washington and Oregon to be skewed in favor of:
    - being in the 35 to 44 age group;
    - having a better education;
    - living in households with three or four persons;
    - having children present;
    - having incomes of $25,000 or more.

* In addition, there are as many vacationers in Washington and Oregon claiming to be hooked up to cable television as claiming to own a common backpack (58%). This suggests a rather large skew in terms of vacationers' being cable subscribers.

B. Typical Vacation Behavior

* The type of area visited by the largest proportion of Washington and Oregon vacationers is a big city, followed sharply lower in importance by the oceanside, a smaller town, a resort area, and a mountainous or wilderness area.

* When on vacation, Washington and Oregon tourists most often end up staying in a hotel or a motel; staying with friends or relatives is of secondary importance.

- Summer is the most popular period for taking a vacation, whether long or short.

- Short vacations (up to 6 nights away) are of about equal importance as long vacations (7 nights away or longer); that is, the populations of Washington and Oregon break down into approximately equivalent proportions of residents who take short vacations and long vacations.

- As one would expect, there are many more "infrequent" vacationers in the marketplace than there are "frequent" vacationers.

- Yet, within each category -- whether "frequent" or "infrequent" -- there is no predominance in terms of the length of the vacation taken. In other words, "frequent" vacationers do not appear to take shorter vacations more often, they just generally take more vacations, both short and long. Similarly, "infrequent" vacationers do not seem to take longer vacations less often, they just take fewer vacations, both short and long.

- The average short vacation is taken 2.4 times every 2 years, lasts 4 nights, is planned 2 months in advance, involves 2.7 persons, costs an average of $748, and more often is taken in a car or other road vehicle.

* The average long vacation is taken 1.7 times every 2 years, lasts 15.1 nights, is planned 3.6 months in advance, involves 2.6 persons, costs an average of $1588, and more often involves an airplane trip.

* Long vacations more often involve visiting friends, using a travel agent and renting a car than short vacations.

* Favorite non-BC destinations for Washington and Oregon vacationers (representing BC's biggest "competition") are the US West Coast, particularly California. Oregonians are particularly fond of California as a vacation destination.

C. BC Market Penetration

* BC's penetration of the Washington-Oregon market is high. Almost three-fourths of Washington and Oregon tourists claim to have ever been to BC; furthermore, a healthy majority claim to have been there three or more times. BC penetration is somewhat higher in Washington than in Oregon.

* Those who are the most likely to have taken the greatest number of and the most recent vacations to BC are:

  - "frequent" vacationers;
  - those with household incomes over $25,000;
  - those with a positive interest in traveling to BC within the next 12 months.

* By a factor of about three, BC is much more successful at attracting tourists going on short vacations than on long vacations.

* Vacationers claim that they have most often visited Vancouver and Victoria/Butchart Gardens when on vacation in BC; Southeast BC and Vancouver Island are comparatively secondary BC destinations.

D. Overall Attitudes And Motivations

* Washington and Oregon tourists are fairly optimistic about taking future vacations, particularly:

- men;
- those under age 35;
- those with household incomes of $25,000 or more;
- those with better educations;
- households with children present;
- those with a positive interest in traveling to BC in the next 12 months.

* The main motivations of Washingtonians and Oregonians to take a vacation are:

- to relax (even in the context of getting out and doing things);
- to see the sights.

* Visiting relatives can also be important, but it is more often secondary to other motivations.

- Of course, money is also an important factor to vacationers, and people certainly want to feel that they have been given their money's worth in terms of vacation expenses.

- On the other end of the scale, there appears to be very little importance attached to a rich style of living on a vacation. The mainstream of the Washington and Oregon market shows a relatively low interest in visiting a cosmopolitan city, staying in fancy accommodations, gambling, or even getting a good sun tan.

- Lest one get the impression that Washington and Oregon vacationers are exclusively low-brows, it should be noted that at the same time they eschew rich living they also overwhelmingly reject the notion of "roughing it." The average Washington and Oregon vacationer prefers neither extreme.

- Water sports dominate the list of activities that people say are important to them when on a vacation -- especially swimming, boating and fishing. This shows how important swimming pools, lakes, rivers and the ocean can be in terms of selecting a vacation destination.

E. Attitudes Toward BC

- BC is currently very highly regarded in terms of what might be called its "outdoor-ness" -- being a good place for enjoying the outdoors, visiting a national park or camping out. BC is also perceived to be a good place for being together as a family and for going to new places.

* This latter item, "going to new places," is interesting in view of the fact that so many vacationers in Washington and Oregon have already visited British Columbia. There nevertheless appears to be good recognition that many facets of BC remain to be experienced.

* On the opposite end of the spectrum are four items on which, for self-evident reasons, BC rates more poorly. Realistically, of course, there is very little BC can do to alter these particular perceptions from the point of view of Washington and Oregon tourists:

- experiencing a change of climate;
- visiting relatives;
- getting a good sun tan;
- gambling.

* But when the list of things that are important on a vacation are compared to the things on which BC is highly regarded, three items emerge which offer the greatest promise as the basis of a marketing strategy aimed at attracting visitors to BC:

  - going to new places;
  - enjoying the outdoors;
  - being together as a family.

* Three other aspects about BC show potential for being added to the list of the three items above if vacationers' perceptions of them in connection with BC can be improved. They are:

  - getting a high value for the dollar;
  - experiencing a change of scenery;
  - feeling "invited."

* However, to avoid backfiring, BC's claims to any of these three aspects must not be laid falsely. There is evidence of a certain amount of backfiring with respect to the recently used claim "high value for the dollar."

* Either because they are relatively unimportant in consumers' minds or they are weak points for BC, appeals such as camping out, experiencing a different culture, dining at fancy restaurants, etc., do not appear to be suitable candidates to play a major role in BC's marketing programs in Washington and Oregon.

F. Travel Interest In BC

* Three-fourths of Washington and Oregon vacationers express a positive interest in taking a vacation to British Columbia within the next 12 months. This

figure is particularly impressive because about half of that number is composed of those who claim to be "very" interested in such a vacation.

- Washington vacationers tend to be a little more interested in a BC vacation than Oregon vacationers.

- Travel interest to BC cuts across a broad range of socio-economic lines. Factors such as income, household size, presence of children in the household, household ownership, and sex do not distinguish between a person who is very interested in traveling to BC and one who is not.

- At the same time, there are a few characteristics that do distinguish between a person who is very interested in traveling to BC and one who is not. As a result, BC's best prospects for a future vacation would appear to be the following:
  - those who have ever been to BC, and in particular, "frequent" BC visitors;
  - those with a positive outlook for travel in the future;
  - those oriented towards short vacations;
  - those with better educations.

- It is important to note that those who have "ever been" to BC are among the most anxious to return.

This is a positive indication for seeking repeat business from Washington and Oregon tourists. In other words, BC's best future tourist prospects are most likely to be its current customers.

* Another important finding in this study is that the factor which would appear to have the greatest effect on increasing interest in traveling to British Columbia would be to provide vacation prospects with specific information about where to go and what there is to do in BC.

* Of course, the planned major exposition in Vancouver in 1986 will almost certainly attract a great deal of tourists from Washington and Oregon. Approximately half of all respondents indicate that that event will increase their interest in taking a vacation to BC. But even Expo 86 was less powerful at increasing interest in traveling to BC than getting specific information about where to go and what to do in BC.

* Many tourists' interest in traveling to BC would also be increased by getting more information about how BC is different from what is already available at home.

* The main reason given for a lack of interest in taking a vacation to BC is that other vacation plans have already been made, or that other

destinations are preferred. Also prominently mentioned are "being too familiar" with BC or finding BC "too similar" to Washington and Oregon. Obviously, people with these kinds of reasons will not be easy to convince to go on a BC vacation.

G. Principal BC Destinations

* There are four principal BC destinations in the minds of those expressing a positive interest in taking a vacation to BC in the next 12 months:

- Victoria;
- Vancouver;
- Vancouver Island;
- Butchart Gardens.

* Ironically, these same four destinations are also at the top of the list of those that people claim to have visited most often in BC. This highly consistent pattern suggests that, as far as Washington and Oregon tourists are concerned, a vacation to BC essentially involves one or more of these "big four" destinations.

* The main reasons given for not being interested in visiting certain specific BC destinations are as follows:

Vancouver: is often not considered a vacation destination (e.g., "I'm not interested in visiting a city"); or, to a lesser degree but in the same vein, there is "nothing of interest" in Vancouver.

Victoria and/or Butchart Gardens: many people have been to these places before and feel they have seen all there is to see there.

Vancouver Island, Whistler/Blackcomb and the Okanagan: most uninterested vacationers say they do not know enough about these destinations to be able to know whether they would want to visit them or not.

Harrison Hot Springs: Harrison Hot Springs has some market presence; nevertheless, a substantial minority of those with negative attitudes towards this destination say that there is simply nothing there (or about hot springs in general) that interests them.

BC Rockies: are perceived to be too similar to the mountains in the US. The feeling that "you've seen one mountain, you've seen 'em all" is not atypical.

H. Advertising Recall

* Although a healthy majority of vacationers claimed to recall some form of BC advertising, much of what was played back was either disappointingly general,

or worse, the probable result of guesswork (such as the recall of beautiful scenery or mountains). In addition, a noticeable portion of BC advertising recall was actually incorrect.

* Claimed recall was generally higher in Washington than in Oregon, no doubt owing to the fact that no direct advertising was done in Oregon (only a small amount of advertising in regional publications was run in Oregon, plus some unavoidable "spillover" from the Washington border).

* Unfortunately, less than one in ten respondents played back what might be termed "specifically correct" ideas from BC advertising. These were items such as the notion that your money buys a lot of value in BC or the slogan "Super, Natural."

* There is clear evidence that advertising from Canada and British Columbia is blurred in consumers' minds. A sizable portion of BC advertising recall was incorrectly derived from advertising promoting tourism in Canada, e.g., the phrase "Come On Up."

* Even on an "aided" basis where respondents were read several advertising copy points and asked if they remembered them from BC advertising, recall of the correct phrase "Super, Natural" was signifi-

cantly lower than the incorrect recall of Canada's slogan "Come On Up."

I. Ski Market

* Approximately 42% of Washington and Oregon vacationers are either active skiers or are those interested enough in the sport to be considered prospective skiers. However, only about half of this group (24%) are currently active skiers.

* Both Washington and Oregon appear to have skiers and non-skiers in approximately the same proportions.

* Downhill skiing appears to be preferred to cross-country skiing by greater than a two-to-one margin. About two-thirds of Washington and Oregon skiers claim to prefer downhill skiing, whereas cross-country skiing is preferred by only about one quarter of skiers. (The remainder like both types of skiing equally.)

* Washington skiers tend to be a little more interested in downhill than Oregon skiers, while Oregon skiers show a correspondingly elevated interest in cross-country.

* Whistler/Blackcomb is the best known BC ski area by far among Washington and Oregon skiers, and it is the only BC ski area with any substantive

top-of-mind ("unaided") awareness. On this basis its overall awareness may be judged to be reasonably good.

* The preponderance of Whistler's awareness emanates from Washington. In fact, awareness of almost any BC ski area is significantly higher in Washington than in Oregon (the single exception to this is Mount Washington).

* Awareness of the other BC ski areas exists almost exclusively in terms of "aided" awareness, but even so it is significantly lower than that for Whistler/Blackcomb. Apex/Alpine and Mount Washington come closest to Whistler in overall awareness among Washington and Oregon skiers.

# #

RECOMMENDATIONS

The information generated from this study indicates that the following specific actions should be considered as ways to facilitate or increase Washington and Oregon tourism to British Columbia:

- Continue to emphasize Washington somewhat more than Oregon in advertising and promotions because Washington is at the present time the more active and fertile travel market.

- For media purposes define the target market for BC tourism as vacationers with the following demographic characteristics:
  - both men and women;
  - those 35-44;
  - some college education or college degree;
  - families with children;
  - households with $25000+ income.

- Because so many Washington and Oregon vacationers have already been to BC, and because previous visitors show a greater interest in taking a future vacation to BC, concentrate on repeat business as opposed to new trial. As the saying goes, "Fish where the fish are."

- For the reasons just explained, plus the fact that for every single "long" vacationer BC attracts it attracts three "short" vacationers, BC should establish as its primary target market:

   - current frequent BC visitors;
   - those oriented towards taking short vacations (1-6 nights in Washington and 2-6 nights in Oregon).

* In line with this target market definition, and because it is always easier to attract customers in ways which are consistent with already existing patterns of consumer behavior, BC should be positioned in Washington and Oregon as a destination for shorter rather than longer vacations.

* Water resources -- including swimming pools, the ocean, lakes and streams -- can be a critical factor in selecting a vacation destination. Accordingly, water and water-related activities should be included in BC's advertising and promotion materials whenever possible.

* Because vacationers generally eschew both rich-style living on vacation as well as "roughing it," care should be taken to avoid either of these extremes in characterizing or typifying a BC vacation.

* An advertising and promotional campaign based on new and interesting destinations in BC (allowing

secondary emphasis on outdoor family enjoyment) should be formulated and tested. This study provides several compelling reasons for this:

- "Going to new places" is not only an important objective for vacationers, it is also perceived as one of BC's strongest points.

- While there are two other items that also show high promise as a basis for attracting visitors to BC ("enjoying the outdoors" and "being together as a family"), "going to new places" is especially promising because it is the one item of the three that cannot be pre-empted by competing destinations. For example, California or many other places could just as well be a good place for enjoying the outdoors or being together as a family, but only BC has certain new and interesting places to see. (BC destinations are, by definition, unique.)

- "Going to new places" lends itself to an information-based campaign, dovetailing nicely with the fact that vacationers want specific information about where to go and what there is to do in BC.

- One of the most important of all motivations for taking a vacation is "to see the sights."

An advertising campaign based on seeing new and interesting places in BC (which are perfect places for the family to enjoy the great outdoors together) is a natural extension of this motivation.

- Because relatively little is known about Vancouver Island, Whistler/Blackcomb and the Okanagan, these destinations are prime candidates for profiling as "new" places to see in BC. However, there are probably myriad other possibilities in terms of BC destinations that could be highlighted in such a campaign.

- Care should be taken not to omit the "big four" as "new" and interesting BC destinations. The "big four" have been and are a large part of what people expect to visit when they vacation in British Columbia. Perhaps the "big four" can best be blended into a "new places" campaign simply by refreshing them with new and interesting angles on their traditional attractions.

- Because of the low interest expressed in this study for visiting "a cosmopolitan city," Vancouver obviously should not be positioned to prospective Washington and Oregon vacationers as a chic, worldly capital. But neither is there anything in this study that suggests that Vancouver could not fit in with a "new places" campaign. Since most people can be expected to already be somewhat familiar with Vancouver, the challenge will be to show them things about the city, or specific parts of it, that make it easy for people to figure out what they wish to see and do there.

* Thus, whenever possible, new reasons for people to visit BC should be created. Expo 86 is an obvious example of a case where a new, major reason to visit BC will exist, and it will undoubtedly provide the impetus for a great number of Washington and Oregon vacationers to visit BC. In the same vein, it makes sense to highlight special festivals, ethnic celebrations, special wildlife migrations -- almost anything -- to provide people with pertinent reasons to vacation in BC.

* In effect, let Canada communicate the emotional reasons for considering a vacation north of the border, but let BC give Washington and Oregon tourists the factual, genuine and concrete reasons for going on vacation to British Columbia.

* To combat the problem of confusion between Canadian and British Columbian advertising, devise and test future advertising to ensure that it establishes an unmistakably distinct image for BC apart from Canada. This is important because

without a separate identity British Columbia may as well let Canada create the tourism it wishes to benefit from.

* Because specific information about what there is to do and see in British Columbia is of such paramount importance, consideration should be given to promoting a toll-free "800" telephone number or other convenient means to facilitate the free flow of such information to prospective BC vacationers.

* Consider improving consumer perceptions of BC in terms of "good value for the money" and "you're invited" if conditions in the future appear that such claims can be credibly made for BC without backfiring.

* Periodically track vacationers' future expectations in terms of number of vacations and vacation spending as a gauge of the health and relative viability of the Washington and Oregon marketplace. The progress of new advertising towards creating an image for BC separate and apart from Canada could also be tested at the same time.

* The ungratifyingly low recall of the phrase "Super, Natural" (much lower than the incorrect recall of Canada's slogan "Come On Up") suggests a rethinking of the true efficacy of this slogan, the way in which it was executed in the advertising, and/or

the adequacy of the weight of the advertising pressure that is currently being used in Washington and Oregon.

* In a separate research study, investigate the viability and efficacy of the strategy of showing or demonstrating how BC is different from Washington and Oregon. The feeling that BC is no different from Washington and Oregon is a potential dampener of BC tourism, and discovering how to negate this problem could be valuable for future advertising and promotional efforts.

* Because cable subscription appears to be high among vacationers, investigate cable as an alternative way to efficiently reach Washington and Oregon vacationers.

* Since awareness of Whistler/Blackcomb is much better among skiers in Washington, test the effectiveness of a special promotion in Oregon to raise awareness of Whistler as a ski destination there. Consider using Whistler/Blackcomb as a "new" ski destination in line with the "going to new places" theme.

* Finally, most but not all of Washington and Oregon skiers are interested in downhill rather than cross-country skiing. Downhill skiing should

therefore be emphasized in future BC ski promotions, but not necessarily to the total exclusion of cross-country.

# #

DETAILED FINDINGS

I. Current Market Composition

A. Types Of Vacationers

It was assumed in this study that vacationers from Washington and Oregon could take either of two kinds of trips to British Columbia -- either a short vacation of up to six nights away or a longer one of a week or more away from home. On this basis, respondents were asked a series of questions about the extent to which they took either of those categories of vacations and, when appropriate, under what conditions.

The results of these questions are summarized below. In an attempt to reflect the total market, the figures below are based upon all contacts made in this research, not just qualified respondents.

[Note: Some of the contacts in this study were excluded because they did not qualify as vacationers; therefore, they were not a part of the formal tabulation of the main body of results. Yet they are included here because they help to reflect the dimensions of the total market of vacationers and non-vacationers.]

As explained in the Methodology section of this report, results have been weighted to yield data that reflect the proportionate populations of Washington vis-a-vis Oregon.

Types Of Vacationers

	Wash: Wghtd X1.58		Oregon	Wghtd Total
BASE: Total # Contacts	904*		620	1524
CURRENT VACATIONERS Took either type of vacation past 2 years	78%	** <-	69%	75%
VACATION PROSPECTS Took no vacation in past 2 years but expect to take one or more in next 12 months	9		12	10
TOTAL VACATION-PRONE	87%	<-	81%	85%
NOT IN TRAVEL MARKET No vacations past 2 years and no travel intentions in next 12 months	13	->	19	15

*Data weighted to reflect actual populations -- see p. 5.
**Arrows denote statistical significance.

The results above show quite clearly that a very dominant proportion of the Washington-Oregon population could be described as "Vacation-Prone" (85%) -- that is, being either a "Current Vacationer" (75%) or a "Vacation Prospect" (10%).

Thus, at any one time only about 15% of the resident population of Washington and Oregon may be considered to be completely out of the vacation travel market.

While the vast majority of residents of both states are prone to travel, Washington residents appear to be somewhat more prone to take vacations (87%) than Oregon residents (81%).

Notice also that Oregon also has a slightly greater proportion of residents who are not in the travel market at all (19%) compared to Washington (only 13%).

Perhaps the evidence of the slightly weaker travel market potential in Oregon can best be explained by the higher unemployment and generally weaker economy in that state in the recent past in comparison to Washington. In any case, there is no doubt that while the potential market for tourism in general appears to be reasonably good in both states, Washington is, at least at the present time, a somewhat more fertile area.

When those who have had at least some vacation experience in the past two years are examined, we see that the same pattern of a somewhat more favorable and active travel market in Washington persists.

Types Of Vacationers

	Wash: Wghtd X1.58)		Oregon	Wghtd Total
BASE: Total # Contacts	904		620	1524
Took one or more 1-6 night vacations in past 2 years (Net)	56%	<-	47%	52%
Took both 1-6 night and 7 night or longer vacations in past 2 years	34	<-	27	31
Took only 1-6 night vacations in past 2 years	22		20	21

(Table continued on next page)

Types Of Vacationers, Con't.

	Wash: Wghtd X1.58)		Oregon	Wghtd Total
BASE: Total # Contacts	904		620	1524
Took one or more 7 night or longer vacations in past 2 years (Net)	56%	<-	49%	53%
Took both 1-6 night and 7 night or longer vacations in past 2 years	34	<-	27	31
Took only 7 night or longer vacations in past 2 years	23		21	22

Specifically, a greater proportion of Washington residents took a 1-6 night vacation in the past two years (56%) when compared to Oregon residents (only 47%). This pattern was also consistent for 7 night or longer vacations (56% among Washington residents vs. only 49% among Oregon residents).

Perhaps more important, however, is the fact that the populations of both Washington and Oregon break down into approximately equivalent proportions of residents who took 1-6 night vacations (52%) compared to those who took 7 night or longer vacations (53%). [These two statistics add to greater than 100% because they do not represent mutually exclusive categories.] The point is that both of these two main types of vacations have large and roughly equal proportions of adherents in the Washington-Oregon travel market.

It appears that about a third of the total market in both states took both types of vacations in the past two years (31%), but, as one might expect from what has been seen so far, this pattern of duality was somewhat more prevalent in Washington (34%) than in Oregon (27%).

B. Overall Vacation Frequency

Before turning to the frequency with which residents of Washington and Oregon take vacations, some definitions must first be established.

A frequent 1-6 night vacationer is defined in this study as one who has taken four or more such vacations in the past two years. An infrequent 1-6 night vacationer has taken from one to three such vacations in the past two years.

A frequent 7 night or longer vacationer is defined in this study as one who has taken three or more such vacations in the past two years. An infrequent 7 night or longer vacationer has taken only one or two such vacations in the past two years.

For the reader's convenience, these definitions are summarized in the table below:

	Number of Vacations In Past 2 Years	
	1-6 Night Vacations	7 Night Or Longer Vacations
Infrequent Vacationers	1-3	1-2
Frequent Vacationers	4 or more	3 or more

That leaves us to define a frequent or infrequent vacationer in overall terms, without specific regard to which type of vacation has been taken.

In overall terms, a frequent vacationer is defined in this study as one who qualifies as a frequent vacationer in at least one of the categories above. Similarly, an infrequent vacationer is one who doesn't qualify as a frequent vacationer in either of the two categories above, but who does qualify as an infrequent vacationer in at least one of the two categories above.

Using these definitions, the following table shows how the Washington and Oregon market breaks down in terms of overall vacationing frequency. [Again, the figures below are based upon all contacts made in this research, not just the interviews which were included in the formal tabulation of the main body of the results of this study.]

Overall Vacation Frequency

	Wash: Wghtd X1.58		Oregon	Wghtd Total
BASE: Total # Contacts	904		620	1524
Infrequent Vacationers (Net)*	48%		44%	46%
1-6 Nights	33		30	32
7 Nights Or Longer	31		27	29
Frequent Vacationers (Net)	31%	<-	25%	28%
1-6 Nights	23	<-	17	21
7 Nights Or Longer	26	<-	21	24

*"Net": that which remains after removing all duplication due to multiple responses.

As one would expect, there are many more infrequent vacationers in the marketplace (46%) than there are frequent vacationers (28%).

However, within each category -- whether infrequent or frequent -- there are about equal proportions of those who claim to have taken shorter (1-6 night) vs. longer (7 nights or longer) vacations.

This indicates that, while the Washington-Oregon travel market is definitely skewed toward infrequent vacations, within each category there is no predominance in terms of the length of the vacation taken.

In other words, one might hypothesize that frequent vacationers in Washington and Oregon qualify as such because they take more shorter vacations rather than fewer longer ones. The data in this study show that this is not the case; rather, frequent vacationers simply take more vacations in general -- of both short and long duration.

The same principal holds true for infrequent vacationers -- they take less vacations in general -- both short and long.

In yet another indication of the more active travel market in Washington, the figures above also show that a significantly higher proportion of Washington residents are frequent vacationers (31%) compared to Oregon residents (25%).

C. Intentions To Travel/Spend In The Future

At one point in the interview, respondents were asked whether they intended to take more, less or the same number of vacations in the future.

This question was used not only to determine the extent of positive expectation about traveling in general, but also to classify respondents in terms of their potential for future travel.

Respondents were also asked a similar question about their intentions to spend money on future vacations. The results of both of these questions are shown on the following page:

Future Travel Expectations

	Wash: Wghtd X1.58	Oregon	Wghtd Total
BASE:	790	500	1290
Number Of Vacations			
More	49%	49%	49%
The Same	36	35	38
Fewer	14	15	13
Don't Know	1	1	1
Vacation Spending			
More	51%	51%	51%
The Same	33	33	34
Less	14	15	14
Don't Know	1	1	2

About half of the Washington and Oregon respondents interviewed in this study appear to have a highly optimistic outlook in terms of future vacations and vacation spending. From 49% to 51% indicate that they will take more vacations in the future and/or spend more money on future vacations than they now do.

Only about 15% of the vacationers of each state indicate that they will be traveling and/or spending less on vacations in the future.

[It would be interesting to track the results of these two questions on a periodic basis to see what kind of trends would result over time in the Washington and Oregon market.]

There are no statistically significant differences in the results from these two questions when the data from Washington and Oregon are compared. However, there are several significant differences which occur when the data are examined among several of the other subgroups that have been singled out in this research.

Subgroups Which Tend To Have The Most Positive Expectations About Taking More Vacations In The Future

- MEN (54%) more than women (45%)
- THOSE UNDER 35 (53%) more than those over 35 (46%)

(Table continued on next page)

- THOSE WITH HOUSEHOLD INCOMES OVER $25,000 (52%) more than those with household incomes $25,000 or below (46%)

- THOSE WITH SOME OR ALL OF A HIGHER EDUCATION (51%) more than those with lesser educations (43%)

- HOUSEHOLDS WITH CHILDREN PRESENT (53%) more than households without children (46%)

- THOSE WITH A POSITIVE INTEREST IN TRAVELING TO BC WITHIN THE NEXT 12 MONTHS (59%) more than those not interested (38%)

With the single exception of those with "Some Or All Of A High School Education," the same subgroups shown above are also the ones with the most positive expectations concerning the expenditure of more money on future vacations.

That there is, in fact, a positive correlation between those with an optimistic outlook in terms of future vacations and vacation expenditures and those with a positive interest in traveling to BC within the next 12 months is, of course, rather encouraging.

D. BC Market Penetration

Respondents were asked if they had ever been on vacation in British Columbia, and if so, how many times, how long ago, and where in British Columbia they had ever been.

The results of the first of these questions, shown below, provide key information about the extent to which BC has currently penetrated the Washington-Oregon market as a vacation destination.

Extent of Vacation Travel To British Columbia

	Wash: Wghtd X1.58	Oregon	Wghtd Total
BASE:	790	500	1290
Ever Been	79%	63%	73%
Never Been	21	37	27

Almost three-fourths of the vacationers in Washington and Oregon (73%) claim to have ever been on vacation in British Columbia. Not unexpectedly (considering the difference in proximity), BC penetration is significantly higher among Washington vacationers (79%) than among Oregon vacationers (only 63%).

Looked at from another perspective, this means that in Washington only about one-fifth of the travel market are non-triers of the British Columbia travel "product," whereas in Oregon the figure is just a bit more than one-third of the travel market (37%).

At these levels, even in Oregon, BC penetration must be considered relatively well-saturated.

In fact, product trial would seem to be high enough that increasing BC trial would probably be of ever decreasing marginal utility as a marketing strategy.

On the contrary, these data seem to indicate that it is repeat business that should be sought for the expansion of tourism in British Columbia from the two states of Oregon and Washington.

Subgroups With The Highest Proportions Who Have "Ever Been" To BC

- THOSE AGE 35 OR OVER (70%) more than those under 35 (57%)
- THOSE WITH HOUSEHOLD INCOMES OVER $25,000 (68%) more than those with household incomes $25,000 or below (57%)
- HOUSEHOLDS WITH CHILDREN PRESENT (69%) more than households without children (59%)
- THOSE WITH SOME OR ALL OF A HIGHER EDUCATION (67%) more than those with lesser educations (58%)
- THOSE WITH A POSITIVE INTEREST IN TRAVELING TO BC WITHIN THE NEXT 12 MONTHS (69%) more than those not interested (61%)

These data tell us that those who have historically vacationed most in British Columbia are over age 35, live in households with incomes over $25,000 where children are present, are better educated, and are those with a positive interest in returning to BC.

Happily, those who have "ever been" to BC are also among those who are the most anxious to return. This is an encouraging indication of probable success if "repeat business" is sought for BC tourism from Washington and Oregon vacationers. In other words, BC's best future tourist prospects are most likely to be its current tourists.
In another vein, other questions such as "How many times have you ever been on vacation in British Columbia?" and "In what year did you take your most recent vacation to British

Columbia?" were asked of those who said they had ever been on vacation in British Columbia.

The results from these particular questions are shown below:

Number Of Times Ever Been To BC

	Wash: Wghtd X1.58		Oregon	Wghtd Total	
BASE:	623		313	936	
One	15%	->	30%	20%	
Two	20		20	20	
Three - Five	31		30	31]	] 61%
Six Or More	34	<-	20	30]	
Average Number Of Times	7.2	<-	4.5	6.3	

How Long Ago Did You Most Recently Vacation In BC?

	Wash: Wghtd X1.58		Oregon	Wghtd Total
0 - 2 Years Ago	55%	<-	41%	50%
3 - 5 Years Ago	25		23	24
6 - 9 Years Ago	9	->	14	11
10 Years Or More	10	->	22	14

These results show that a remarkable 61% of the two-state market who have ever been to BC claim to have been there three or more times. The average number of times which this same group claims to have ever been to BC on vacation is more than six!

Even factoring into these numbers the probability that they are overstated somewhat (because people could be expected to overstate something like their total visitation habits), they are fairly large numbers and suggest a high degree of current familiarity with BC among the populations of Washington and Oregon.

Washington, of course, accounts for the greater share of these claims. In fact, a significantly greater number of Washington vacationers claim to have been to BC six or more times (34%) compared to Oregon vacationers (only 20%). On the other end of the scale, twice as many Oregon vacationers claim to have only been to BC once (30%) compared to Washington vacationers (15%).

Not all of these trips to BC were made over the course of a lifetime. Fully half (50%) of those who have ever been to BC indicate that their most recent vacation to the province was within the past two years.

Considering the difference in proximity, it is predictable that Washington vacationers' trips to BC are much more likely to have been recent than Oregon vacationers'. Specifically, about 55% in Washington who have ever been to BC claim to have been to BC in the past two years compared to a significantly smaller 41% in Oregon. In the same vein, 22% of Oregon vacationers who have ever been to BC claim that their most recent vacation to BC was 10 years ago or longer, compared to less than half that proportion in Washington (10%).

Analysis of the subgroups' responses to these questions provides additional dimension to these results. Identified below are those subgroups in which there are statistically significant differences in responses to these two questions. First shown are those subgroups claiming to have vacationed in BC the greatest number of times, followed by those subgroups whose vacations to BC have been the most recent.

Subgroups Who Tend To Have Vacationed In BC Most Often
(Average # Of Vacations In BC Shown In Parentheses)

- FEMALES (6.4) more than males (6.2)*
- FREQUENT VACATIONERS (7.6) more than infrequent vacationers (5.4)
- THOSE AGE 35 OR OVER (6.7) more than those under 35 (5.6)
- THOSE WITH HOUSEHOLD INCOMES OVER $25,000 (6.9) more than those with household incomes $25,000 or below (5.6)
- THOSE WITH SOME OR ALL OF A HIGHER EDUCATION (6.5) more than those with lesser educations (5.7)
- HOUSEHOLDS WITHOUT CHILDREN (7.0) more than households with children (5.3)
- THOSE WITH A POSITIVE OUTLOOK FOR TRAVEL IN THE FUTURE (6.8) more than those with a negative outlook (5.8)
- THOSE WITH A POSITIVE INTEREST IN TRAVELING TO BC WITHIN THE NEXT 12 MONTHS (8.3) more than those not interested (4.5)

*Although some of these numerical differences appear small, all shown in this table are statistically significant.

Thus, the groups which have the greatest amount of vacation experience in BC are more likely to be female frequent vacationers, over age 35, have household incomes greater than $25,000, be better educated, have no children living at home, have a positive outlook in terms of future travel, and have a positive interest in visiting BC in the next 12 months.

Now, turning to those subgroups whose vacations to BC have been the most recent:

Subgroups Who Tend To Have Taken The Most Recent Vacations In British Columbia (% Vacationing In BC In Past 2 Years Shown In Parentheses)

- MALES (53%) more than females (47%)
- FREQUENT VACATIONERS (55%) more than infrequent vacationers (50%)
- THOSE UNDER 35 (54%) more than those age 35 or older (48%)
- THOSE WITH HOUSEHOLD INCOMES OVER $25,000 (54%) vs. those with household incomes $25,000 or below (less recent)
- THOSE WITH A POSITIVE INTEREST IN TRAVELING TO BC WITHIN THE NEXT 12 MONTHS (61%) more than those not interested (39%)

The groups which have the most recent vacation experiences in BC are more likely to be male frequent vacationers under 35, have household incomes over $25,000, and have a positive interest in traveling to BC within the next 12 months.

There are only three subgroups that are common to both summary lists above. Thus, frequent vacationers who have household incomes over $25,000 and have a positive interest in traveling to BC within the next 12 months are most likely to have taken the greatest number and the most recent vacations to BC.

Let us turn now to identifying the most popular vacation destinations in British Columbia as represented by the current BC travel patterns of Washington and Oregon vacationers.

When those who had ever been on vacation to British Columbia were asked where they had ever gone in that province, the following results emerged:

Where Ever Been On Vacation In British Columbia

	Wash: Wghtd X1.58		Oregon	Wghtd Total
BASE:	623		313	936
Vancouver & Vicinity	82%	<-	71%	78%
Victoria/Butchart Gardens	56	->	71	61
Vancouver Island	31		35	33
Southeastern BC	27	<-	14	23
Northern BC/Interior	7		7	7
Other Misc. BC	15		10	13
Banff/Lake Louise	7		11	9
Other Incorrect	4		4	4
Don't Know	3		6	4

Based upon the results of answers to this question, the most visited BC vacation destinations are far and away Vancouver (78%) and Victoria/Butchart Gardens (61%). In fact, after other destinations on Vancouver Island (such as Campbell River, Nanaimo, etc.) and points in southeastern BC are considered, the remaining BC destinations appear to be of relatively little significance as far as tourism from the Washington-Oregon market is concerned.

Note that there is a small yet visible proportion of the market that incorrectly states "Banff" or "Lake Louise" in answer to this question (9%). In other parts of this research there are similar indications that a certain proportion of the market seems to be confused about where British Columbia actually begins and ends in Canada.

As far as Washington vacationers are concerned, Vancouver is the most often visited destination in BC (82%), having a significantly greater margin of visitorship over Victoria/Butchart Gardens (only 56%).

Interestingly, Victoria and Butchart Gardens tie with Vancouver for tourism from Oregon vacationers (71% for both destinations). At the same time, Victoria and Butchart Gardens are much more popular with Oregon vacationers (71%) than with Washington vacationers (56%).

Almost as if to compensate for this, Washington vacationers are apparently about twice as likely to visit southeastern BC destinations (27%) as Oregon vacationers (only 14%).

There are no significant differences in the results from this question among the various subgroups singled out in this research, except that there is a slight tendency for more females to claim to have gone to Victoria (64%) than males (50%).

Another facet of the popularity of various BC destinations can be derived from where tourists would go if they were contemplating a vacation to British Columbia. This particular question was asked of all those who expressed a positive interest in the possibility of taking a vacation in British Columbia within the next 12 months.

Where Likely To Go On Vacation In British Columbia

	Wash: Wghtd X1.58		Oregon	Wghtd Total
BASE:	618		373	991
Vancouver & Vicinity	55%		50%	53%
Victoria/Butchart Gardens	38	->	55	44
Vancouver Island	19		22	20
Southeastern BC	13	<-	3	9
Northern BC/Interior	2		2	2
Other Misc. BC	9		7	8
Banff/Lake Louise	7		7	7
Other Incorrect	3		3	3
Don't Know	12		18	14

Except for some rather inconsequential differences, the results from this question mirror almost exactly those from the previous one. [One difference is that a larger proportion of respondents do not know where they would go if they were to take a vacation to British Columbia (14%).]

Suffice it to say that the high degree of consistency in responses to these two questions increases the confidence with which one can say that, as far as Washington and Oregon tourists are concerned, a vacation to British Columbia essentially involves the choice of Vancouver or Victoria as principal destinations, with Vancouver Island and Southeastern BC as destinations of decidedly secondary importance.

Having seen where vacationers have gone or would go in British Columbia, let us now turn to the question of other vacation destinations that compete with British Columbia in the Washington and Oregon market.

Respondents were asked to tell us the furthest state, province or country where they went on their most recent vacation. This information is available by the length of the most recent vacation taken -- either a 1-6 night vacation or a 7 night or longer vacation. Results are shown below for the destinations of respondents' most recent 1-6 night vacation:

Furthest State, Province Or Country
Visited On Most Recent 1-6 Night Vacation

	Wash: Wghtd X1.58		Oregon	Wghtd Total
BASE:	504		292	796
US West Coast (Net)	46%		45%	45%
California	15	->	26	19
Oregon	17	<-	6	13
Washington	13		12	13
Alaska	1		1	1
Other US West (Net)	24%		25%	24%
Nevada	9		12	10
Idaho	5		6	5
Montana	4		1	3
Utah	2		1	2
Arizona	1		3	2
Colorado	1		2	1
Wyoming	1		*	1
All Other US States	13		12	12
Canada Net)	11		12	11
British Columbia	9		11	9
Other Provinces	2		*	1
BC And Other	*		*	*
Hawaii	3		3	3
Mexico	2		3	2
Other Foreign Destinations	2		1	2

*Less than .5%

For short vacations of up to six nights away from home, British Columbia's most important competition is the US West Coast (45%), particularly the state of California (19%).

This pattern is particularly visible among Oregon tourists (26% vs. 15% of Washington tourists). Notice, too, that there is a predictable amount of intrastate as well as interstate vacation travel in the Washington and Oregon market.

Visited much less often than the West Coast but still by a significant segment of the market are the other US western states (24%), particularly Nevada (10%).

As one can see, Canada appears to have about the same share of the Washington and Oregon travel market as Nevada, with the vast majority of Canadian tourism going to the province of British Columbia (9% out of a possible 11%).

The share of market for British Columbia appears to be about equal from both Washington (9%) and Oregon (11%). (These numerical differences are not large enough to be considered statistically significant.)

Now let us see how the vacation destination picture looks in terms of 7 night or longer vacations.

Furthest State, Province Or Country Visited On Most Recent 7 Night Or Longer Vacation

	Wash: Wghtd X1.58		Oregon	Wghtd Total
BASE:	510		302	812
US West Coast (Net)	26%	->	32%	28%
California	19	->	24	20
Washington	3		3	3
Oregon	2		3	2
Alaska	2		2	2
Other US West (Net)	14%		16%	15%
Arizona	2		5	3
Nevada	3		3	3
Montana	2		1	2
Utah	2		2	2
Colorado	2		3	2
Idaho	1		1	1
Wyoming	2		1	1
Other Foreign Destinations	14	<-	9	12

(Table continued on next page)

Furthest State, Province Or Country Visited On Most Recent 7 Night Or Longer Vacation, Con't.

	Wash: Wghtd X1.58	Oregon	Wghtd Total
BASE:	510	302	812
All Other US States	13	12	12
Hawaii	11	11	11
Mexico	5	5	5
Canada (Net)	4	6	4
British Columbia	2	4	3
Other Provinces	1	1	1
BC And Other	*	*	*

*Less than .5%

On longer vacations, Washington and Oregon vacationers still visit the US West Coast more often than any other category of destinations (28%), but when there is more time to travel, the importance of other, further-away destinations rises predictably.

For a better look at this, let us compare the array of destinations for 1-6 night vacations side-by-side to 7 night or longer vacations:

Furthest State, Province, Or Country Visited

	Weighted Totals		
	1-6 Night Vacations		7 Night Or Longer Vacations
BASE:	796		812
US West Coast (Net)	45%	<-	28%
California	19		20
Oregon	13	<-	2
Washington	13	<-	3
Alaska	1		2
Other US West (Net)	24%	<-	15%
Nevada	10	<-	3
Idaho	5	<-	1
Montana	3		2
Utah	2		2
Arizona	2		3
Colorado	1		2

(Table continued on next page)

Furthest State, Province, Or Country Visited, Con't.

	Weighted Totals		
	1-6 Night Vacations		7 Night Or Longer Vacations
BASE:	796		812
Wyoming	1%		1%
All Other US States	12		12
Canada (Net)	11	<-	4
British Columbia	9	<-	3
Other Provinces	2		1
BC And Other	*		*
Hawaii	3	->	11
Mexico	2	->	5
Other Foreign Destinations	2	->	12

*Less than .5%

Here it can clearly be seen that Canada's share of the longer vacation market from Washington and Oregon erodes from 11% on shorter vacations down to only 4% on longer vacations.

Even though British Columbia still gets the lion's share of tourism to Canada from Washington and Oregon on longer vacations, BC's particular share of the longer vacation market suffers a commensurate loss from 9% to only 3%.

The biggest beneficiaries of market share in the longer vacation category are Hawaii (going from 3% to 11%), Mexico (going from 2% to 5%), and other foreign destinations (going from 2% to 12%).

Overall, these figures depict a situation in which British Columbia generates its greatest share of the vacation market from Washington and Oregon in terms of shorter vacations of up to 6 nights away from home. British Columbia's success in Washington and Oregon is much more limited in terms of the vacation market involving longer stays away from home of 7 nights or longer.

In marketing it is widely held that it is always easier to attract customers in ways that are consistent with already exisiting patterns of consumer behavior. Considering this axiom, it would seem wise to promote British Columbia in both Washington and Oregon as the ideal destination for shorter, rather than longer, vacations.

E. Typical Travel Patterns

Respondents were asked a number of questions about several aspects of their most recent 1-6 night and/or 7 night or longer vacation. The results of these questions are summarized below in two parts.

Part I includes those questions which can be summarized with a single statistic, e.g., "Average # Nights Away," "Average # In Party," etc. After a brief discussion of the meaning of these results, Part II will then address (on an individual basis) those questions which cannot easily be combined in a single table, e.g., "Most Important Motive," "Type Of Area Visited," etc.

Summary Of Typical Travel Patterns - Part I

	1-6 Night Vacations			7 Night Or Longer Vacations		
	Wash: Wghtd X1.58	Ore	Wghtd Total	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	504	292	796	510	302	812
Average # Vacations Past 2 Years	2.5<-	-2.1	2.4	1.7	1.7	1.7
Average # Nights Away	3.9	4.1	4.0	15.0	15.1	15.1
Average # Months Planned	2.1	2.2	2.2	3.5 ->	3.8	3.6
Average # In Party	2.7	2.7	2.7	2.6	2.6	2.6
Average $ Cost Of Trip	762	722	748	1,634	1,511	1,588
% Visiting Friends/ Relatives	47->	54	49	66	65	65
% Acompanied By Children	29	26	28	26	27	26
% Using Travel Agent	26	27	26	41	41	41
% Doing Business On Vacation	17	17	17	14	18	16
% Using Package Deal	16	12	15	18	18	18
% Using Rental Car	9	10	9	19	19	19

The average vacationer in Washington and Oregon takes a short (1-6 night) vacation about 2.4 times in a two-year period, spends an average of 4 nights away from home, plans

the trip about two months in advance, takes along an average of 2.7 persons and spends an average of about $748 (or about $69.30 per person per day).

Consistent with previous findings in this report that Washington is a somewhat more active and fertile travel market than Oregon, the results above show that Washingtonians take short vacations with a slightly greater frequency (2.5 times every two years) than Oregonians (only 2.1 times every two years). Similarly, Washingtonians spend a slightly higher amount of money on their short vacations ($762) than Oregonians ($722).

The only other statistically significant difference between the behavior of Washington and Oregon tourists with respect to short vacations is that Oregonians' short vacations appear to involve the visiting of friends and relatives a bit more (54%) than Washingtonians' short vacations (only 47%).

Long vacations offer an interesting contrast to short vacation patterns. The average vacationer in Washington and Oregon takes a long (7 night or longer) vacation about 1.7 times in a two-year period, is gone a little more than two weeks (15.1 nights), plans the trip about three and a half months in advance, takes along an average of 2.6 persons and spends and average of about $1588 (or about $40.45 per person per day).

While there is no significant difference in the frequency with which Washingtonians and Oregonians take long vacations (both take them an average of about 1.7 times every two years), Washingtonians spend a significantly greater amount of money on them (about $1,634 on the average, compared to only about $1,511 for Oregonians).

Notice that Oregonians appear to take a slightly greater amount of time to plan their long vacations (about 3.8 months) compared to Washingtonians (only about 3.5 months).

Now let us directly compare the typical patterns of short vacations to long vacations to see where they are similar and where they are different.

Of course, long vacations involve the expenditure of more money ($1,588) and more nights away from home (15.1) than short vacations ($748 and 4.0, respectively). Because of this, the planning time for a longer vacation is understandably greater than for a short vacation (3.6 months vs. 2.2 months).

The remaining differences between long and short vacations are that long vacations more often involve visiting friends or relatives (65%) than short vacations (49%), more often involve the use of a travel agent (41% vs. 26%) and more often involve the use of a rental car (19% vs. 9%).

But there the differences end. Results show virtually identical patterns for both short and long vacations in terms of the average number of persons in the vacation party (2.6 - 2.7), the percent of cases in which children are taken along (26% - 28%), the percent of cases in which business is also conducted (16% - 17%) and the percent of cases in which a package deal for transportation, accommodations, or both is involved (15% - 18%).

Now let us turn to Part II of typical travel patterns in the Washington and Oregon market, beginning with the type of area visited.

Typical Travel Patterns - Part II - Type Of Area Visited

	1-6 Night Vacations			7 Night Or Longer Vacations		
	Wash: Wghtd X1.58	Ore	Wghtd Total	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	504	292	796	510	302	812
A big city	31%	40%	34%	37%	37%	37%
The oceanside	19	12	16	17	14	16
A smaller town	15	14	15	15	13	14
A resort area	14	14	14	13	17	15
A mountainous or wilderness area	12	12	12	7	7	7
A national park or forest	5	6	6	5	5	5
A non-mountainous or countryside area	4	2	3	6	6	6
Don't know	-	*	*	*	2	1

According to the results of this study, the type of area visited by the largest proportion of Washington and Oregon vacationers is a big city (34% - 37%), followed sharply lower in importance by the oceanside (16%), a smaller town (14% - 15%), a resort area (14% - 15%), and a mountainous or wilderness area (7% - 12%).

There is only one statistically significant difference between the types of areas visited on short vs. long vacations -- and only a small one at that. Specifically, mountainous or wilderness areas are preferred by 12% of those on short vacations compared to only 7% of those on long vacations.

While more Oregon vacationers (40%) prefer a big city as a short vacation destination than Washington vacationers (only 31%), Washington vacationers are somewhat more prone to prefer the oceanside (19%) than Oregon vacationers (only 12%) when on a short vacation.

Perhaps Oregon vacationers are a little more complacent about coastlines because the one in their state is so outstandingly scenic.

In any case, the main point to be learned from this is that a big city has by far the greatest drawing power of all the various types of vacation areas.

Next, let us examine the mode of transportation and the type of accommodations used on vacation by Washingtonians and Oregonians:

Typical Travel Patterns - Part II
Mode Of Transportation And Accommodations Used

	1-6 Night Vacations			7 Night Or Longer Vacations		
	Wash: Wghtd X1.58	Ore	Wghtd Total	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	504	292	796	510	302	812
Mode Of Transportation						
Car/truck/van	65%	63%	64%	40%	44%	41%
Airline	30	29	29	51	48	50
All other	6	8	7	9	8	9
Type Of Accommodations						
Hotel/motel	55%	60%	57%	44%	41%	43%
Stayed at friends/ relatives	26	22	24	31	33	32
Campground/trailer park	9	6	8	7	8	8
All Other	10	12	11	17	18	17

The results above show some important although logically expectable differences when short vacations are compared directly to long vacations. Specifically, cars and other road vehicles are used much more on short vacations (64% of the time) than on long vacations (only 41% of the time). On the other hand, airlines are used much more on long vacations (50% of the time) than on short vacations (29%).

Consistent with other results shown previously, staying with friends or relatives occurs a little less often on short vacations (24% of the time) than on longer vacations (32% of the time). It follows then that there is more reliance on staying in hotels or motels on short vacations (57% of the time) than on longer vacations (43% of the time).

These results may be summarized simply: short vacations are more typically taken in cars or other road vehicles and hotels or motels are the most frequently chosen accommodation; long vacations are more typically taken on an airline, and while staying in a hotel or motel is still predominant, staying with friends or relatives is a relatively strong secondary choice.

Now let us look at the season of the year when Washington and Oregon vacationers took their most recent vacations.

Typical Travel Patterns - Part II
Season In Which Most Recent Vacation Was Taken

	1-6 Night Vacations			7 Night Or Longer Vacations		
	Wash: Wghtd X1.58	Ore	Wghtd Total	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	504	292	796	510	302	812
Spring	15%	19%	16%	18%	21%	19%
Summer	44	40	42	46	41	44
Fall	33	33	33	24	22	23
Winter	8	8	8	12	16	13

Summer appears to be the season when almost half of the vacationers in Washington and Oregon took their most recent vacation (42% - 44%). Almost two-thirds of the most recent vacations were taken in either the summer or the fall (65% - 67%).

While there are no statistically significant differences in the seasonal vacation patterns between vacationers of the the two states, there is a noticeable skew towards taking shorter (33%) rather than longer vacations (only 23%) in the fall. Similarly, there is a slight skew towards taking longer (13%) rather than shorter vacations (only 8%) in the winter.

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II. Motivations And Attitudes Of Vacationers

A. General Travel Motivations

Those respondents who had taken at least one short or long vacation within the past two years were asked to state their main motivation for taking either or both types of vacations.

The results from these questions are shown below:

Main Travel Motivations

	1-6 Night Vacations			7 Night Or Longer Vacations		
	Wash: Wghtd X1.58	Ore	Wghtd Total	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	504	292	796	510	302	812
Change of scenery/ to see the sights	36%	39%	37%	35%	31%	33%
To be inactive/rest	24	20	23	32	32	32
To visit relatives	20	23	21	19	17	18
To be active	11	8	10	7	10	8
Change of climate	5	4	5	4	7	5
Entertain the kids	2	3	2	2	2	2
Don't Know	2	3	2	1	2	1

The hierarchy of motivations is slightly different for short and long vacations. Specifically, for short vacations experiencing a change of scenery is of primary importance (37%), followed at a secondary level of importance by both being inactive (23%) and visiting friends/relatives (21%).

Although changing the scenery is the predominant motivation both for respondents' most recent short and long vacations (33% - 37%), of equal importance (not secondary) on long vacations is the idea of being inactive or just resting and relaxing (32%). As a result, the motive to visit relatives on a long vacation falls to a relatively lower secondary level of importance.

Dotted horizontal lines are included in the table above to show the apparent points of separation in the hierarchy of motivations.

There are no statistically significant differences in major vacation motivations when vacationers from Washington are compared to vacationers from Oregon.

B. General Travel Attitudes

In order to measure vacationers' general views of travel, two batteries of multiple vacation attitudes were included in this study. The first of these asked respondents to state the degree to which they agreed or disagreed with several statements about vacations.

The results from this attitude battery are shown below in terms of the percent "strongly agreeing" with each statement:

General Travel Attitudes

	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	790	500	1290
Vacations are for rest and relaxation	49%	49%	49%
Like to see as much as possible when on vacation	49	46	48
Vacations are for getting out and doing things	47	49	48
Like to make all arrangements in advance	40	39	40
Have to know about the spot before selecting it as a destination	29 ->	34	31
Place must be English speaking	29	33	30
Prefer short vacations to long ones	30	27	29
Like to go to a different place on each vacation	30 <-	25	28
Like to be around people on vacation	27	27	27
Like to take vacations using package deals	25	23	24

(Table continued on next page)

General Travel Attitudes, Con't.

	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	790	500	1290
For short vacations, have to arrive within 4 hours	24	23	24
Think "roughing it" is just fine on vacation	19	19	19
Prefer vacation spots recommended by friends	15	17	15

Almost half of Washington and Oregon vacationers strongly agree that one of the main purposes of a vacation is to relax (49%) and/or see the sights (48%).

The fact that an equally large proportion of respondents also strongly agree that "vacations are for getting out and doing things" (48%) rounds out the picture of what is generally most important on a vacation.

In addition, a relatively large segment of vacationers indicate that they like to travel with all of their arrangements made in advance (40%).

Somewhat smaller but still meaningful proportions of respondents strongly agree with the items shown in the middle of the table (bounded by the horizontal dotted lines). These include such things as having to know something about a spot before selecting it as a vacation destination (particularly in Oregon -- 34%), liking to go to a different place on each vacation (particularly in Washington -- 30%), and so on.

At the bottom of the table, relatively few respondents strongly agree that "roughing it" is a good thing on a vacation (19%), or that it is preferable to choose a vacation spot that has been recommended by friends (15%).

A second attitude battery asked respondents to state how important it is for them to have or to do a range of items when on vacation. The results from this battery are shown below in terms of the percent who feel that each item is "very important":

Things That Are Very Important On Vacation

	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	790	500	1290
Getting a high value for the dollar	70%	70%	70%
Being together as a family	66	62	63
Enjoying the outdoors	59	59	59
Experiencing a change of scenery	48	50	49
Going to new places	42	-> 48	46
Feeling "Invited"	45	42	43
Having plenty for the kids to do	33	-> 39	36
Entertaining the kids	32	36	34
Getting to the destination quickly	27	31	29
Visiting important historic places	27	30	29
Experiencing a change of climate	29	27	28
Visiting museums/art exhibits	23	25	24
Experiencing a different culture	23	24	24
Visiting relatives	23	24	24
Visiting a national park/forest	23	18	20
Getting away from people	17	-> 22	20
Shopping for things unavail at home	15	18	17
Camping out	17	17	17
Traveling on a package deal	14	16	15
Participating in sports/activities	15	15	15
Getting a good sun tan	12	12	12
Having plenty of nightlife	11	12	12
Going to a major amuse/theme park	11	11	11
Attending plays/live theater	11	10	10
Dining at fancy restaurants	10	10	10
Staying in fancy accommodations	7	8	8
Visiting a cosmopolitan city	6	6	6
Gambling	7	5	5

It is obvious that money is a very important factor for most people when taking a vacation, and, quite understandably, people want to feel that they have been given their money's worth. As evidence of this, slightly more than two-thirds of Washington and Oregon tourists feel it is very important to get a high value for their vacation dollar (70%).

Also of relatively high importance when on vacation are being together as a family (63%), enjoying the outdoors (59%), experiencing a change of scenery (49%), going to new places (46%), and the feeling of welcome that comes from "feeling invited" (43%).

With the exception of "feeling invited," all of the items mentioned above are considered very important by the statistical equivalent of at least half of all the respondents in this study.

Many of these items have already been discussed elsewhere in this report as important factors in or strong motivations for taking a vacation.

On the other end of the scale, there is apparently very little importance attached by Washington and Oregon vacationers to many items which are often associated with fast-paced, fancy living, e.g., gambling (5%), visiting a cosmopolitan city (6%), and staying in fancy accommodations (8%). Even getting a good sun tan is of major importance to only a very small proportion of Washington and Oregon tourists (12%).

There are only three statistically significant differences in the results of this attitude battery when the Washington and Oregon data are directly compared. All of these differences are in favor of Oregon, but none seem to have any readily apparent common denominator. They are: going to new places (48% vs. only 42% for Washington), having plenty for the kids to do (39% vs. only 33% for Washington), and getting away from people (22% vs. only 17% for Washington).

In a special "filter" question, those respondents who felt that it was "very" or "somewhat" important to participate in sports and activities on vacation were asked to indicate which ones they regard as important. These results are shown below in terms of the percent feeling each sport is important as a vacation activity:

Sport/Activities That Are Important When On Vacation

	Wash: Wghtd X1.58		Ore	Wghtd Total
BASE:	412		277	689
Swimming	91%	<-	85%	87%
Canoeing/boating/ kayaking	73	<-	64	69
Lake/stream fishing	64		62	63
Warm water sports e.g., snorkeling	57	<-	47	53
River rafting	50		55	52
Water skiing	50		45	48

(Table continued on next page)

Sport/Activities That Are Important When On Vacation, Con't.

	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	412	277	689
Ocean fishing	46	43	45
Downhill skiing	44	39	42
Tennis	36	39	37
Golf	32	38	34
Cross-country skiing	33	30	32
Scuba diving	31 <-	24	28
Hunting	22	26	24

The fact that the top seven items in the table above are water-related sports shows how important pools, lakes, rivers and oceans can be to people in selecting a vacation destination. The absence of these kinds of resources can be a critical factor to a certain segment of the vacation market, but fortunately for British Columbia, all of these resources are readily available for those who want them.

Certain of these sports, specifically swimming, canoeing/boating, warm water sports/snorkeling, and scuba diving are a bit more important to Washington vacationers than to Oregon vacationers [see arrows].

At the bottom in terms of importance are mostly land-based sports activities (with the single exception of scuba diving), including skiing, tennis, golf and hunting.

C. Attitudes Toward Travel In British Columbia

Now let us turn to another battery of vacation attitudes -- this one having to do with vacationers' feelings toward travel in British Columbia. This battery was administered to all respondents in this study regardless of whether or not they had ever traveled to BC.

Specifically, vacationers were asked to give their impressions as to how British Columbia would rate -- good, fair, or poor -- in terms of each of the items in the previous attitude battery.

The results from this attitude battery are shown below in terms of the percent of respondents who rated British Columbia "good" on each item.

Things Rated "Good" About BC

	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	790	500	1290
Enjoying the outdoors	89%	91%	90%
Being together as a family	83	86	84
Going to new places	82 ->	87	84
Visiting a national park/forest	81	84	82
Camping out	77	80	78
Visiting museums/art exhibits	73	73	73
Experiencing a change of scenery	71	74	72
Visiting a cosmopolitan city	71	70	71
Getting a high value for the dollar	71	70	70
Entertaining the kids	69	71	70
Staying in fancy accommodations	69	71	70
Feeling "Invited"	67 ->	73	69
Getting to the destination quickly	69	67	68
Visiting important historic places	66	70	68
Dining at fancy restaurants	66	69	67
Having plenty for the kids to do	64	64	64
Getting away from people	63	63	63
Experiencing a different culture	59 ->	64	61
Participating in sports/activities	59	58	59
Attending plays/live theater	58	55	57
Shopping for things unavail at home	54 ->	60	56
Having plenty of nightlife	58 <-	51	55
Traveling on a package deal	51 ->	59	54
Going to a major amuse/theme park	51	48	50
Experiencing a change of climate	34 ->	44	38
Visiting relatives	31	31	31
Getting a good sun tan	21 <-	16	19
Gambling	15	11	13

British Columbia clearly enjoys many positive perceptions in the minds of Washington and Oregon vacationers. Fully half or more of all respondents included in this study rate BC "good" on 24 of the 28 items comprising this attitude battery.

Three of the top five items on which British Columbia is rated highly have to do with what might be called BC's "outdoor-ness." BC is seen as a good place for enjoying the outdoors (90%), visiting a national park or forest (82%), and camping out (78%). Going along with these high ratings are the perceptions that BC is good for being together as a family (84%) and good for going to new places (84%).

This latter item is interesting in view of the fact that so many vacationers in Washington and Oregon have already visited British Columbia [see page 36]. There nevertheless appears to be good recognition that many facets of BC remain to be experienced.

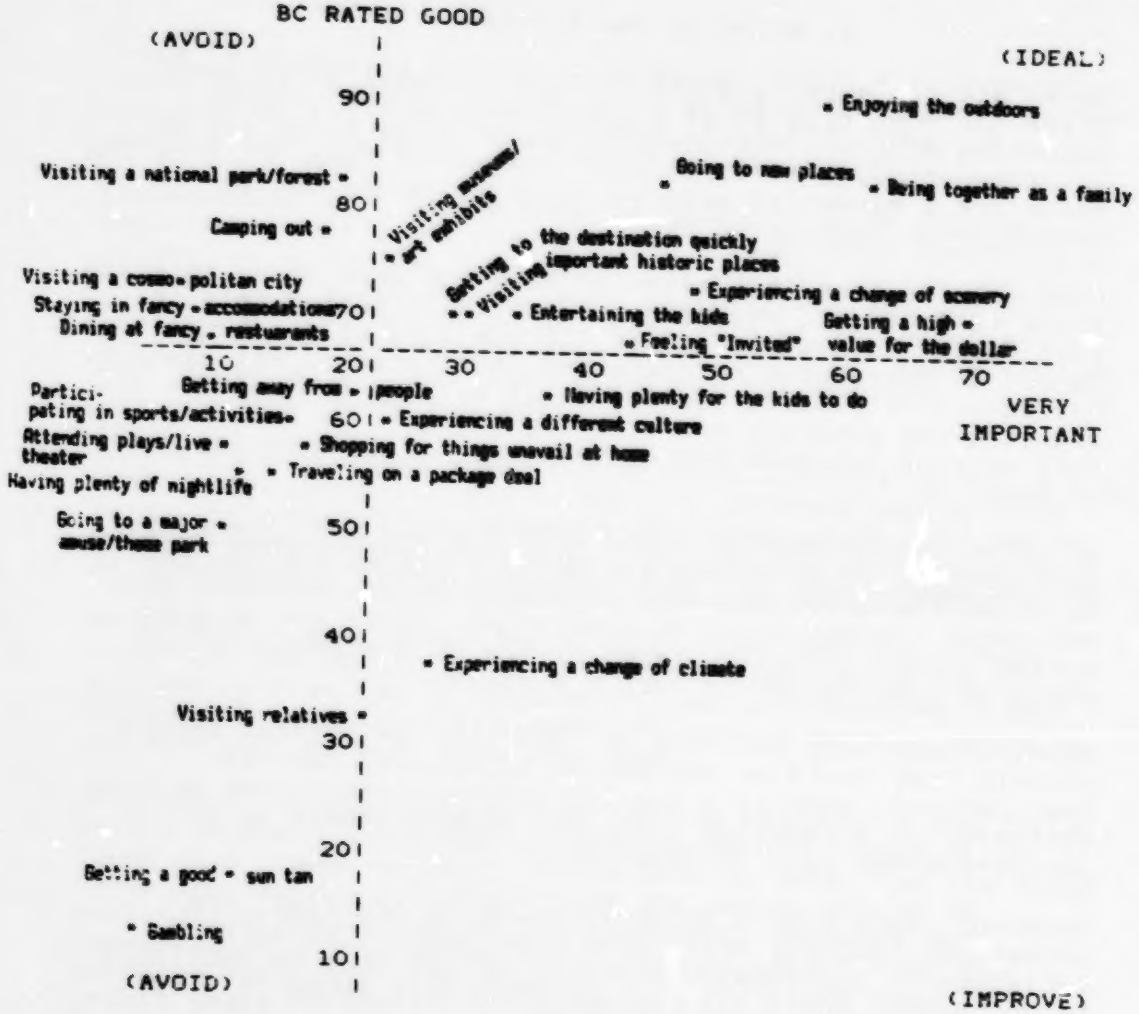
On the opposite end of the list are four items upon which, for self-evident reasons, BC rates much less highly: experiencing a change of climate (38%), visiting relatives (31%), getting a good sun tan (19%) and gambling (13%). Realistically, of course, there is very little BC can do to alter these particular perceptions.

When BC's ratings among Washington vacationers are directly compared to those of Oregon vacationers, several statistically significant differences emerge. These differences are probably attributable to the fact that, since fewer Oregonians have ever been to BC, they have a somewhat lower level of accumulated knowledge about British Columbia.

For example, Oregon vacationers are more prone than Washington vacationers to feel BC is good for seeing new places (87% vs. 82%), feeling "invited," (73% vs. 67%), experiencing a different culture (64% vs. 59%), shopping for things unavailable at home (60% vs. 54%), traveling on a package deal (59% vs. 51%), and experiencing a change of climate (44% vs. 34%).

On the other hand, it is a little more difficult to explain why Washington vacationers are more prone than Oregon vacationers to feel BC is good for having plenty of nightlife (58% vs. 51%), and especially, for getting a good sun tan (21% vs. 16%)!

In an attempt to provide a picture of how vacationers rate BC on the items that are considered most and least important on a vacation, the two previously discussed multiple attitude batteries have been combined into a single "quadrant analysis" table. The X-axis of the table plots the ratings of the importance of items on a vacation and the Y-axis plots the ratings of BC as a vacation destination which provides those items. The axes have been adjusted so that they intersect at each other's median point.



The upper right-hand quadrant represents the ideal situation -- where items are rated as "very important" on a vacation and BC is rated as "good" in providing them. Ten items are in this quadrant, but (as is often the case in this kind of analysis) many are hugging the boundary axes of the quadrant and therefore must be considered just marginally inside. The further in toward the area on the table marked "IDEAL," the better.

The three items that are deepest in the interior of the upper right-hand quadrant are the ones which most offer the winning combination of being both important to tourists and already widely perceived as true about British Columbia. These three are:

1. enjoying the outdoors
2. being togetner as a family
3. going to new places

These are the aspects about British Columbia which would offer the most promise as a foundation of its tourism marketing program. Fortunately, these three ideas can be interconnected, that is to say, any one of them could be the basis for a marketing program, with the other two as secondary or supporting themes.

However, the item that seems to make the most sense to stand alone is "going to new places." The logic behind this is that "going to new places" is the one item of the three that cannot be pre-empted by competing destinations. For example, California or Alberta could just as well be good places for enjoying the outdoors and/or being together as a family, but only British Columbia has certain new and interesting places to see.

An advertising campaign based upon the new and interesting destinations in BC (which are perfect places for the family to enjoy the great outdoors together) is one way that this strategic concept could be contructed. There are no doubt myriad possibilities in terms of the BC destinations that could be highlighted in such a campaign.

Destinations need not even be "new" in the literal sense; rather, they could be new angles on already familiar destinations, such as a special child-oriented side trip in Victoria, or a favorite vista for photographers in an out-of-the-way park in Vancouver.

Moreover, each time a BC destination is profiled, one bothersome handicap which sometimes hampers vacation decisions -- not knowing where to go and what is available to do there-- would also be attacked [see pages 71 - 72].

Turning now to the items in the lower right-hand quadrant (and those hugging the X-axis of the upper right-hand quadrant) -- these are the ones which vacationers consider relatively important but where BC does not rate so well. Theoretically, it would be a plus if tourists' perceptions of BC could be elevated in terms of these items because even more good reasons for vacationing in British Columbia would then be created.

Based on the existing relatively high level of their perceived importance, there are three items to which consideration should therefore be given for improving BC's consumer perceptions:

1. getting a high value for the dollar
2. experiencing a change of scenery
3. feeling "invited"

There is something curiously different about all three of these items compared to the three items found deepest in the interior of the quadrant. Perhaps it is that they are somehow more concrete, or "testable" by tourists.

For example, if a person goes on vacation to BC with an expectation the he or she will get a high value for their dollar, or encounter friendly local people, at the end of the vacation if either of those expectations are not met the vacationer will surely be acutely aware of it. He or she will probably have a much less distinct mental impression as to whether or not such conditions as, for example, "enjoying the outdoors" have been met.

In the case of these more "testable" situations it is usually not enough merely to improve consumer perceptions (e.g., by advertising favorable exchange rates), but often it also means making sure that the improved perception can be demonstrably backed up under real life conditions.

If BC advertising says, for example, that you get a high value for the dollar in BC, then that claim needs to be noticeably true for it to have its maximum intended effect. Otherwise, there is the danger that the claim will backfire and possibly do more harm than good.

This point is made here because of the results of the focus groups recently conducted in Washington and Oregon which found that there was very little drawing power for the "high value for the dollar" claim [see the report titled "A Qualitative Evaluation Of Two Friendship Exchange Radio Commercials"]. That study found that it wasn't that the exchange rate wasn't noticeably more favorable than in recent years -- but rather that once vacationers were in BC they often found that higher nominal prices made up for most if not all of the benefit gained through the exchange of currency.

The results of this study seem to confirm the findings of those recent focus groups -- that "high value for the dollar" is not the strongest thing BC has to say about itself.

Moreover, perhaps the consumer disenchantment discovered in the focus groups in terms of "high value for the dollar" is the reason that that particular item hugs the X-axis of the "quadrant analysis" table instead of being situated in the much more desirable interior area of the quadrant.

Either because they are relatively unimportant in consumers' minds or they are weak points for BC, the remaining items in this "quadrant analysis" table are placed in or near the two left-hand quadrants -- both upper and lower. Consequently, these items do not appear to be suitable candidates for playing a major role in BC's marketing programs.

D. General Interest In Travel To BC

All respondents were asked to indicate how interested they were in traveling on vacation to BC in the next 12 months. Results from this question are shown below:

Interest In Taking A BC Vacation

	Wash: Wghtd X1.58		Ore	Wghtd Total	
BASE:	790		500	1290	
Very interested	40%	<-	35%	38%	76%
Moderately interested	38		40	38	
Not at all interested	22		25	23	
Don't know	1		1	*	

*Less than .5%

Approximately three-quarters of Washington and Oregon vacationers express a positive interest in taking a vacation in British Columbia within the next 12 months (76%). This figure is even more impressive because of the fact that at least half of the strength of that number comes from those who are "very interested" in taking a vacation in BC (38%).

The top scale point is the one in which we can have the most confidence that respondents are expressing a truly positive opinion. It is usually a favorable indication when the top scale point of a question like this is as strong or stronger than the next-lower scale point.

In terms of the top scale point, Washington vacationers are slightly more interested than Oregon vacationers in visiting British Columbia (40% vs. 35%). This outcome is consistent with other data in this report which shows a slightly stronger and more active travel market in Washington [see pages 30 - 32].

Analysis of the subgroups' responses to this question reveal several statistically significant differences. For example, those with better educations (41%), those with a positive outlook for travel in the future (45%), and those who are oriented towards taking short vacations (42%) have a generally higher interest in taking a vacation to BC in the next 12 months.

There was also a tendency for those who own a backpack, snow skis, or a vacation home to exhibit an elevated interest in vacationing in BC.

Perhaps most importantly, interest in vacationing in BC was higher among those who had ever been to BC (41%) and it was particularly high among frequent BC visitors (53%).

At the same time, this means that interest in taking a near term future vacation to British Columbia exists roughly to the same degree across a broad range of other socio-economic characteristics, i.e., income, household size, presence of children in the household, household ownership, sex, and length of vacation taken.

The pattern that this reveals is one which suggests that British Columbia is able to appeal to a plurality of types of vacationers in Washington and Oregon. At the same time, BC's best prospects for a future vacation would appear to be the following types:

* those who have ever been to BC, and in particular, frequent BC visitors;

* those with a positive outlook for travel in the future;

* those oriented towards shorter vacations;

* those with better educations;

* those who own a backpack, snow skis, or a vacation home.

Next, respondents who indicated that they were "not at all" interested in taking a vacation to BC within the next 12 months were asked to say why they felt that way. These results are shown on the following page:

Reasons For Not Wanting To Take A Vacation To BC

	Wash: Wghtd X1.58		Ore	Wghtd Total
BASE:	172		127	299
Other Plans/Not Interested (Net)	42%		46%	44%
Other plans already made/ going elsewhere	15	->	24	18
Want to see other destinations first	19		13	17
Always go elsewhere/prefer warmth/sun	8		13	10
Other "not interested"	1		2	1
Too Familiar/Similar (Net)	31		32	32
Nothing there interesting	12		16	14
Been there before/seen it all	12		11	12
Not a vacation destination	7		3	6
Not that different from here	3		4	3
Other "too familiar"	1		-	1
Not In Travel Market (Net)	28		26	27
Not enough money	6		11	8
Not enough time	9		7	8
Not interested now	6		7	6
Other "not in travel market"	7		2	5
Not a nice place/negative feelings	7		2	5
Need more information/don't know enough about it	3		2	3
Too expensive/a trap	4		1	2
Don't know	3		5	4

The main reason given for lack of interest in taking a vacation to BC is that other vacation plans have already been made or that other destinations are preferred (44%).

Being too familiar with BC or finding it too similar to Washington and Oregon are the next most frequently mentioned reasons for non-interest in a BC vacation (32%).

The third most often cited reason for a lack of interest in a BC vacation is that a vacation is not at the present time being considered (27%).

People with these kind of reasons, of course, will not be easy to sucessfully encourage to take a near term BC vacation. As is often the case when people are asked their reasons for not choosing to use a particular product or service, the reasons given are usually rather intractable.

There is only one statistically significant difference in these results when the Washington data are compared to the Oregon data. For reasons which are not readily apparent, more Oregon vacationers say that other vacation plans have already been made (24%) than Washington vacationers (15%).

E. Interest In Travel To Specific BC Destinations

Those who expressed any positive interest in traveling to BC in the next 12 months were asked where they would probably go on such a vacation. [These results have already been discussed on pages 35 - 45].

Then, if certain specific areas in BC were not mentioned, respondents were asked how interested they would be in going to those particular spots -- very interested, moderately interested, or not at all interested. Finally, any respondent who expressed a negative interest in any particular spot was asked why he or she felt that way.

The results from the question dealing with the level of interest in traveling to certain BC destinations are shown below in terms of percent of respondents who are "very" interested in traveling to each spot:

Interest In Certain BC Destinations -- Aided List

	Wash: Wghtd X1.58		Ore	Wghtd Total
BASE:	615		371	984
Victoria	62%	->	77%	68%
Vancouver (City)	64		64	64
Vancouver Island	52	->	64	56
Butchart Gardens	44	->	54	48
BC Rockies	42		45	43
Harrison Hot Springs	41		38	40
Whistler/Blackcomb	32	<-	26	30
The Okanagan	29		29	29

The BC destinations which respondents are most interested in visiting on a vacation in the next 12 months are Victoria (68%), Vancouver (64%), Vancouver Island (56%), and Butchart Gardens (48%). The statistical equivalent of half or more of those who were asked this question responded that they were "very" interested in visiting these four particular spots.

It should be noted that these destinations were also at the top of the list in the results from the question "If you were to take a vacation in British Columbia in the next 12 months, where would you go?" [See page 42].

One is tempted to criticize the marketplace for its lack of imagination when one observes that not only are these four destinations the ones most often visited in BC, but these are also the destinations people continue to be most interested in visiting, and, presumably, revisiting.

Because Washington and Oregon vacationers have exhibited such a low predilection for visiting BC destinations other than the "big four," it is intriguing to contemplate a marketing effort aimed at directing tourism elsewhere in BC.

Because other parts of this study indicate the importance of providing vacationers with specific information about BC destinations, it makes sense at least to test whether providing vacationers with specific information about non-"big four" destinations would result in an overall increase in BC tourism.

However, considering the consistency and strength of consumers' past and future intentions to visit the "big four" destinations, any promotional efforts in this regard might do well to use the drawing power of the major destinations along with the other featured spots.

Lastly, it should be noted that Oregon vacationers when compared to Washington vacationers express a particularly high degree of interest in visiting Victoria (77% vs. 62%), Vancouver Island (64% vs. 52%), and Butchart Gardens (54% vs. 44%). In the same vein, Washington vacationers express a somewhat higher degree of interest than do Oregon vacationers in visiting Whistler/Blackcomb (32% vs. 26%).

Now let us turn to the reasons which vacationers give for having no interest in visiting any of these same destinations.

In this case, since relatively little negative interest was expressed for any given destination (less than 10%), the sample sizes are not large enough to permit analysis on any but a total sample basis for these questions.

Reasons For No Interest In Visiting...

	(# Of People Responding Shown In Parentheses)
Vancouver (City)	(58)*
Not a vacation destination	42%
Nothing there that interests me	28
Been there before/seen it all	16
Not a nice place/negative feelings	12
Not that different from here	10
Other miscellaneous/don't know	8
Victoria	(30)*
Been there before/seen it all	49%
Nothing there that interests me	14
Not a vacation destination	14
Don't know enough about it	10
Other miscellaneous/don't know	20
Butchart Gardens	(88)
Been there before/seen it all	61%
Nothing there that interests me	18
Need more information	14
Not a nice place/negative feelings	9
Not a vacation destination	8
Other miscellaneous/don't know	12
Vancouver Island	(36)*
Don't know enough about it	36%
Nothing there that interests me	18
Been there before/seen it all	17
Too expensive	9
Want to see other destinations 1st	6
Other miscellaneous/don't know	23
Whistler/Blackcomb	(95)
Don't know enough about it	50%
Don't ski	27
Nothing there that interests me	10
Other miscellaneous/don't know	16
The Okanagan	(74)
Don't know enough about it	41%
Nothing there that interests me	19
Been there before/seen it all	19
Not that different from here	16
Other miscellaneous/don't know	7

*Caution: small sample bases

(Table continued on next page)

Reasons For No Interest In Visiting...(Con't.)

	(# Of People Responding Shown In Parentheses)
Harrison Hot Springs	(90)
Nothing there that interests me	43%
Been there before/seen it all	18
Not a vacation destination	17
Don't know enough about it	13
Not a nice place/negative feelings	10
Other miscellaneous/don't know	14
BC Rockies	(72)
Too familiar/similar	51%
Don't know enought about it	28
Need more information	18
Other miscellaneous/don't know	9

Although there are no particularly surprising revelations in this data, it is nevertheless interesting to see the various reasons for vacationers' lack of interest in certain destinations.

The main reasons given for not being interested in visiting Vancouver are that it is not considered a vacation destination (e.g., "I'm not interested in visiting a city") or, to a lesser degree but in the same vein, there is simply nothing in Vancouver that interests them.

People who are are not interested in visiting Victoria and/or Butchart Gardens say it is primarily because they have been there before and feel that they have seen all there is to see.

The main reason tourists are uninterested in visiting Vancouver Island, Whistler/Blackcomb and the Okanagan is that they don't know enough about these destinations to be able to make up their minds about them. As a result, these three destinations would seem to be logical candidates for being one of the "new places" for vacationers to see in BC [see page 68].

A substantial minority of those with negative attitudes towards Harrison Hot Springs say there is nothing there (or about hot springs in general) that interests them. The second-most important reason for not wanting to visit this destination is "I've been there before," indicating a certain amount of market presence for the locale.

Lastly, the main reason for not wanting to take a vacation to the BC Rockies is that they are perceived to be too similar to the mountains at home. A typical comment expressing this idea was, "You've seen one mountain, you've seen 'em all."

F. Interest In BC If Certain Conditions Were Met

All respondents were asked how their interest in taking a vacation to British Columbia would change -- increase, decrease or stay the same -- if any one of six conditions were met. The six conditions covered a wide range of possibilities, including the opening of a major amusement or theme park in BC, better information on what there was to do or to see in BC, etc.

The results from these questions are summarized below in terms of the percent of respondents whose interest in taking a vacation to BC would increase:

Conditions Which Would Increase Travel Interest In BC

	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	790	500	1290
More information about where to go and what to do in BC	63%	63%	63%
A major world exposition opened in Vancouver in '86	50	52	51
More information about how BC is different from what is already available at home	49	51	50
Well-priced all-inclusive trips to BC including transportation, accommodations, or both	46	48	47
Assurance that the scenery in British Columbia is more dramatic, majestic, and unspoiled than at home	41	44	42
The opening of a major amusement or theme park in BC	24	25	25

The factor which would appear to have the greatest effect on increasing Washington and Oregon vacationers' interest in traveling to British Columbia would be to provide them with more information about where to go and what there is to do in BC. Nearly two-thirds of those included in this study

(63%) indicate that having this kind of information would have a positive effect on their BC travel interest.

It would be difficult to over-emphasize the importance of giving prospective vacationers specific information about where to go and what to do in BC. Moreover, providing such specific information would dovetail nicely with the use of the promising theme "going to new places" as the foundation of a BC marketing program [see page 62].

Adding to the weight of this finding is the relatively high rating of two other items -- "more information about how BC is different from what is already available at home" (50%), and "assurance that the scenery in BC is more dramatic, majestic and unspoiled than at home" (42%).

The fact that these two items come out as high as they do confirms the existence of an obvious problem for British Columbia as far as the Washington and Oregon markets are concerned. That problem is how to make BC seem different in a worthwhile way from the scenery that already exists in the US Pacific Northwest.

Through their answers to these questions, people seem to be saying that they would, in effect, welcome any information that would show them how BC is different from home. Unfortunately, a separate research study would be required to provide specific direction as to whether or not and how this could best be done. In the meantime, the analysis elsewhere in this study suggests that care must be taken not to promise Washington and Oregon vacationers things such as this about BC which cannot truly be fulfilled [see page 63].

The fact that there will be a major exposition in Vancouver in 1986 will, of course, have a positive influence in terms of attracting Washington and Oregon tourists. Approximately 51% indicate that such an event will increase their interest in taking a vacation to BC.

At the very bottom of the list is the item "the opening of a major amusement or theme park in BC" (25%). Even respondents under 35 (30%) and those in households with children (31%) do not respond to this idea at levels approaching the other items on the list. However, it may be necessary to give people more particulars on the kind of amusement or theme park envisioned before their interest will be piqued.

It is doubtful that this statistic is the last word on whether or not such an installation would be successful if located in BC; it was never intended to be used as such. Nevertheless, it does show that respondents were able to give discriminating answers to the wide ranging items included in this particular question.

# #

III. Recall Of British Columbia Advertising

A. Unaided Recall

All respondents in this study were asked if they could recall seeing or hearing any advertising for British Columbia. If their response was affirmative, they were asked to state specifically what they remembered from the BC advertising.

Results from these two questions are shown below:

Unaided BC Advertising Recall

		Wash: Wghtd X1.58		Ore	Wghtd Total
	BASE:	790		500	1290
% Claiming To Recall Any BC Advertising		66%	<-	56%	62%
Specific Recall:	BASE:	518		282	800
Scenery & Activities (Net)		40%		40%	40%
Sights/scenery/natural beauty/ mountains/water		34		34	34
Outdoor activities/skiing/ swimming/hiking, etc.		8		11	9
Victoria (Net)		16%	->	24%	19%
Butchart Gardens/the billboard		4	->	16	9
Princess Marguerite		7	<-	*	4
Going to/come to see Victoria		4		4	4
Other Victoria		4		8	5
Probably Incorrect/Confused (Net)		18%		19%	19%
"Come On Up"		10	<-	6	9
English looking/people in costumes		3		5	4
Come to BC/You're Invited		2		4	3
Other incorrect/confused		4		6	5
General/Specific Correct (Net)		11%	<-	4%	8%
Money buys more/lot of value		6	<-	2	4
"Super, Natural"		4	<-	1	3
Other general/specific correct		2		2	2
Vancouver (Net)		5%		5%	5%
Vancouver/Vancouver night life		5		5	5
Other Vancouver		1		1	1

(Table continued on next page)

Unaided BC Advertising Recall, Con't

	Wash: Wghtd X1.58		Ore	Wghtd Total
BASE:	790		500	1290
Other Miscellaneous (Net)	21%	<-	15%	19%
Harrison Hot Springs	6	<-	*	4
Hotel/package deals	3		2	3
Hotels/facilities	3		2	3
Expo 86	3		2	3
Restaurants/good food	2		2	2
Historical sights/buildings	1		1	1
Other miscellaneous	6		6	6
Nothing/Don't Remember Any Detail	16%		12%	15%

*Less than .5%

On an overall basis, a healthy majority of Washington and Oregon vacationers affirmatively answered that they recalled at least some advertising for British Columbia (62%).

Note that because only a small amount of advertising was actually run in Oregon (there were a few magazine ads run in regional publications that included Oregon, plus some unavoidable "spillover" from advertising placed in Washington), overall claimed recall of BC advertising was greater in Washington (66%) than in Oregon (56%).

In examining the profile of specific recall, the same general pattern of greater recall in Washington is manifest. However, much of what the respondents of either state were able to remember from BC advertising was disappointingly general (and often appeared to be due to guesswork). In addition, a noticeable portion of BC advertising recall was incorrectly confused with advertising from Canada.

First, looking at how generalized the recall was, observe that the most often recalled cluster of ideas from BC advertising deals with "scenery and activities" (40%). This could be legitimate BC advertising recall, of course, but it is also just as possible for much of it to have been advertising for Canada. Equally unedifying, it could have also come from simple conjecture. It was not uncommon to see answers to this question as vague as "just the scenery" or "the mountains and stuff."

Of course, confusion and guesswork can always be present in a question of this type. But a strong profile of advertising recall should ordinarily not have the results of these manifestations as the most conspicuous part of recall.

In terms of incorrect recall, approximately 19% of respondents claiming to remember BC advertising played back ideas that strongly suggest that the ads recalled were not BC advertisements at all.

An example of this incorrect recall is the famous slogan currently promoting tourism to Canada, "Come On Up." This item was recalled by 9% of respondents overall (with a slight tendency for Washingtonians to recall the phrase more than Oregonians (10% vs. 6%). [Apparently, Canada is also running a heavier advertising schedule in Washington.]

What makes this incorrect recall most glaring is its contrast with the recall of the correct BC slogan, "Super, Natural." Only 3% specifically remembered this current BC slogan. In effect, then, recall of Canada's advertising slogan was roughly three times as great as BC's.

In terms of the recall of other elements of BC advertising, "Victoria" was recalled by approximately 19% of respondents, a little more often by Oregon respondents (24%) than Washington respondents (16%).

Apparently, Oregonians have a greater tendency to play back the ubiquitous Butchart Gardens billboard (16%), whereas Washingtonians are more prone to remember ads for the Princess Marguerite (7%). Neither of these elements represents recall of BC advertising sponsored by the Ministry of Tourism.

Only 8% played back what might be termed "generally or specifically correct" ideas from BC advertising, more often coming from Washington respondents (11%) than Oregon respondents (only 4%). Examples of this kind of ad recall are the notion that your money buys a lot in BC (4%), or the specific phrase "Super, Natural" (3%). This is the kind of playback that one would have been pleased to see much more of in this question.

The remaining BC ad recall related to Vancouver (5%) and a host of miscellaneous items (19%), of which there once again was a bit more playback in Washington (21%) than in Oregon (15%). This difference in recall of miscellaneous items can be traced almost entirely to a bulge in the number of mentions of Harrison Hot Springs by Washingtonians (6%) compared to an almost complete lack of mentions of that destination by Oregonians.

Lastly, 15% of those who were asked the question on BC ad recall could not remember anything specific or even general about BC advertising. It is not unusual to see lack of advertising recall to this degree.

B. Aided Recall

Immediately following the "unaided" advertising recall question, an "aided" list of eight selling points was read, each of which could plausibly have been found in BC advertising. Respondents were asked to indicate which selling points, if any, they recalled seeing or hearing in BC advertising.

Results are shown below in terms of the percent of respondents asked the question who claimed to recall each individual item:

Aided BC Advertising Recall

	Wash: Wghtd X1.58		Ore	Wghtd Total
BASE:	518		282	800
Beautiful scenery	92%		90%	91%
"Come On Up"	74	<-	69	72
Good currency exchange rates	55	<-	39	49
"America Borders On The Magnificent"	50	<-	41	47
Ski slopes	50	<-	29	43
Canadian Minister Of Tourism	36		36	36
"Super, Natural"	44	<-	19	35
Package Deals	33		29	32

These data help to round out the total advertising recall picture. First, the generic idea of "beautiful scenery" was recalled by almost everyone who was asked this question (91%). This is the equivalent of virtual saturation in terms of the recall of an "aided" advertising copy point.

Notice also that recall of "beautiful scenery" occurred at statistically equivalent levels in both Washington and Oregon. As mentioned before, it is not unreasonable to expect recall of this item to have been at least slightly greater in Washington due to the heavier advertising pressure there.

The lofty magnitude of the recall of "beautiful scenery" provides additional corroboration that guesswork is probably involved in the recall of this item from BC advertising.

Because it would be hard to imagine an advertisement for British Columbia that did not include beautiful scenery, respondents are no doubt overinflating the true recall of this item.

Precisely because the idea of "beautiful scenery" is so generic, those respondents who recalled it in this question were asked if they were sure that the ad which they were remembering was an ad for British Columbia. Approximately 80% said they were sure it was a BC ad.

It is to be expected that by far the majority of respondents will take a defensive position when they are questioned in this way, so in this case it is more important to evaluate the 20% who were not self-assured.

Unfortunately, only judgement can be applied here since there are no standards of any kind elsewhere for comparison. On balance, the probability is that one-fifth represents a fairly large proportion of respondents willing to openly question their ability to recall something correctly. Most people do not like to admit that they might be wrong about their memory, even in connection with a question as seemingly innocent as this one.

The second-most frequently recalled "aided" item was the slogan "Come On Up" (72%). Of course, as previously noted this slogan is not from BC advertising at all, but rather comes from advertising promoting Canada as a whole.

Incorrect recall of this magnitude is clear evidence that advertising from Canada and from British Columbia tends to be blurred in Washington and Oregon consumers' minds. This is manifestly not a good thing if BC wishes to establish a distinct and separate image for itself. Otherwise, BC would be just as well off paying for more of Canada's advertising to be run in Washington and Oregon.

Notice that there is a slightly greater recall of "Come On Up" in Washington (74%) compared to Oregon (69%), consistent with the outcome for this item in the previously discussed "unaided" recall.

About half of the respondents who were asked this question claimed to recall that BC was advertising "good currency exchange rates" (49%), a fact that was considerably more true in Washington (55%) than in Oregon (39%). This is the most frequently recalled item on the "aided" list that is a specifically correct element of BC advertising.

At the same relative level of recall frequency are two other elements, one a previously used slogan promoting Canadian tourism ("America Borders On The Magnificent" -- 47%), and the other a rather generic (but correct!) element of BC advertising ("ski slopes" -- 43%).

Notice that both of these two elements were also recalled more frequently by Washingtonians than Oregonians [see arrows], particularly in the case of "ski slopes" where 50%

of those in Washington claimed to recall that aspect of BC advertising compared to only 29% in Oregon.

The current BC advertising slogan, "Super, Natural" was also recalled by only about a third of respondents (35%), abetted by a particularly high level of recall in Washington (44%). Overall, this must be judged to be a relatively disappointing level of recall when one considers how high recall can be, as some of the other both correct and incorrect items in this question testify.

At the bottom of the list is the idea of "package deals" (32%), another technically incorrect item of BC advertising recall. The fact that recall of "package deals" is as high as it is provides an estimate of the amount of spuriousness involved with questions like these (where the answers are aided). Some people will say they remember anything.

However, the fact that recall of the correct element "Super, Natural" is as low as "package deals" raises questions either about the true efficacy of this phrase, the way in which it is executed in the advertising, or the adequacy of the weight of the advertising pressure used to support it in Washington and Oregon.

# #

IV. Special Questions On The Skiing Market

A. Types Of Skiers

All respondents were asked a question aimed at describing themselves as a snow skier. The possibilities ran the gamut from a complete non-skier to an active skiing devotee.

The results of this question are shown below:

Incidence of Snow Skiers

	Wash: Wghtd X1.58	Ore	Wghtd Total
BASE:	790	500	1290
An active skier who regularly or occasionally engages in the sport	24%	24%	24%
A person who does not now ski but who probably would if the opportunity arose	19	17	18
TOTAL SKIERS AND PROSPECTIVE SKIERS	43%	41%	42%
An inactive skier with a fairly low probability of engaging in the sport in the future	12	11	11
A person who does not ski and probably would not if the opportunity arose	46	48	47
TOTAL INACTIVE OR NON-SKIERS	58%	59%	58%

Approximately 42% of Washington and Oregon vacationers are either active skiers or those interested enough in the sport to be considered prospective skiers. Only about half of this group (24% out of 42%) are currently active skiers.

The remaining group of non-skiers (58%) are composed mostly of committed non-skiers (47%), whereas just 11% fall into the category of inactive skiers.

Both Washington and Oregon appear to have approximately equal proportions of all categories of skiers and non-skiers.

Next, all those who were either active or prospective skiers were asked to state which type of skiing -- downhill or cross-country -- they were most interested in. The results from this question are shown below:

Type Of Skiing Preferred

	Wash: Wghtd X1.58		Ore	Wghtd Total
BASE:	337		205	542
Downhill	68%	<-	61%	65%
Cross-country	26	->	32	28
Both equally	7		7	7

Downhill skiing appears to be preferred to cross-country skiing by greater than a two-to-one margin. About two-thirds of Washington and Oregon skiers claim to prefer downhill skiing (65%), whereas cross-country skiing is preferred by only about one quarter of skiers (28%). Approximately 7% indicate that they are equally interested in both types of skiing.

Washington skiers tend to prefer downhill slightly more than Oregon skiers (68% vs. 21%); conversely, Oregon skiers are a little more interested in cross-country than Washington skiers (32% vs. 26%).

B. BC Ski Area Awareness

Those respondents who classified themselves as either active or prospective skiers were also asked which ski areas in British Columbia they were aware of ("unaided" recall). If specific ski areas were not mentioned by respondents, then the areas were named and respondents were asked if they were aware of them ("aided" recall).

Results from these two questions are shown below:

Unaided And Aided BC Ski Area Awareness

	Wash: Wghtd X1.58		Ore	Wghtd Total
BASE:	337		205	542
Whistler/Blackcomb				
Unaided	41	<-	11	30
Aided	30	<-	20	25
Total Recall	71%	<-	31%	55%

(Table continued on next page)

Unaided And Aided BC Ski Area Awareness, Con't.

	Wash: Wghtd X1.58		Ore	Wghtd Total
BASE:	337		205	542
Apex/Alpine				
Unaided	2		-	1
Aided	39	<-	24	33
Total Recall	41%	<-	24%	34%
Mount Washington				
Unaided	-		*	*
Aided	24	->	40	30
Total Recall	24%	->	40%	30%
Panorama				
Unaided	*		-	*
Aided	28	<-	16	23
Total Recall	28%	<-	16%	23%
Big White				
Unaided	2		-	1
Aided	27	<-	13	22
Total Recall	29%	<-	13%	23%
Fernie				
Unaided	-		-	-
Aided	22		22	22
Total Recall	22%		22%	22%
Red Mountain				
Unaided	5		*	3
Aided	23	<-	9	18
Total Recall	28%	<-	10%	21%
Silver Star				
Unaided	-		*	*
Aided	13		10	12
Total Recall	13%		10%	12%
Tod Mountain				
Unaided	2		-	1
Aided	12		9	11
Total Recall	14%		9%	12%
Unaided Recall Only:				
Grouse Mountain	10%		5%	8%
Banff/Jasper	3%		4%	3%
Garibaldi	2%		-	1%

Among Washington and Oregon skiers, Whistler/Blackcomb is the best known BC ski area by far (55% total recall).

Notice that the total awareness for Whistler/Blackcomb comes much more from Washington skiers (71%) than from Oregon skiers (only 31%).

Whistler/Blackcomb is the only ski area where unaided awareness was as high or higher than aided awareness. In fact, if unaided awareness were the only measure taken of consumers' awareness of BC ski areas, Whistler/Blackcomb would be the only ski area with any substantive top-of-mind awareness at all.

Thus, the total awareness of Whistler/Blackcomb may be considered relatively "good" in Washington and relatively "weak" in Oregon.

As the dotted lines in the table suggest, in the next-lower "tier" of total awareness are Apex/Alpine (34%) and Mount Washington (30%). (These levels of awareness are significantly below that for Whistler/Blackcomb.) In a "tier" just under that one are Panorama and Big White (both 23%), Fernie (22%), and Red Mountain (21%). Then, in the lowest "tier" of awareness are Silver Star and Tod Mountain (both 12%).

Because they were not included in the "aided" list of ski areas, Grouse Mountain (8%), Banff/Jasper (3%) and Garibaldi (1%) produced only the indicated levels of "unaided" awareness.

In general, awareness of BC ski areas was significantly higher in Washington than in Oregon. In every case (except one) where there was a statistically significant difference between the two states, total awareness for the individual ski area was higher in Washington [see arrows]. The single exception to this was Mount Washington, where awareness was higher in Oregon.

# #

V. Respondent Demographics

Several questions regarding the demographics of respondents were asked in this study, all of which are summarized below.

As a frame of reference, comparable population statistics are provided from the 1980 US Census for Washington and Oregon (combined). In addition, an index has been calculated on the basis of US Census figures = 100.

For example, an index of 147 for the 35 to 44 age group means that there are approximately 47% more Washington and Oregon vacationers age 35 to 44 than one would find in the general Washington and Oregon population.

The figures for sex, age and education are as follows:

	Wash: Wghtd X1.58	Ore	Wghtd Total	1980 Census Data	Index
BASE:	790	500	1290	(NA)	(NA)
Sex					
Male	45%	51%	47%	48%	98
Female	55	49	53	52%	102
Age					
21 to 25	13%	11%	13%	14%	93
26 to 34	29	27	28	26	108
35 to 44	25	26	25	17	147
45 to 54	12	12	12	14	86
55 to 64	10	12	11	14	79
65 And Over	11	11	11	16	69
Refused	-	*	*	NA	NA
Education					
Not thru high school	4%	6%	5%	23%	22
Completed high school	22	20	21	37	57
Some/all/voc/college	74	74	74	40	185
Refused	-	*	*	NA	NA

*Less than .5%

On this basis it seems safe to conclude that, unless there is some reason to suspect that the sample drawn in this study is unduly biased (or respondents are not being truthful in their answers), there is a relatively strong tendency for vacationers to concentrate in the 35 to 44 age group.

In a similar vein, with indices of 98 and 102 there is no particular tendency for Washington and Oregon vacationers to skew towards either sex.

In terms of education, it can be clearly seen that there is a significant skew in terms of vacationers' being educated beyond high school (index = 185). Unfortunately, the probability that respondents are minimizing their poor educations and exaggerating their better educations casts some doubt on the exact magnitude of this skew.

Now lets us examine the data for household size, presence of children, and home ownership:

	Wash: Wghtd X1.58	Ore	Wghtd Total	1980 Census Data	Index
BASE:	790	500	1290	(NA)	(NA)
Household Size					
One	16%	19%	17%	24%	71
Two	34	35	35	34	103
Three	17	20	18	16	112
Four	21	17	19	15	127
Five or more	12	9	11	11	100
Presence Of Children					
Yes	46%	40%	44%	36%	122
No	54	60	56	64	87
Home Ownership					
Own	67%	70%	68%	65%	105
Rent	32	29	31	35	89
Other	*	*	*	*	100
Refused	*	1	*	NA	NA

Vacationers tend to have either three or four persons in their households (indices = 112 and 127, respectively). Consequently, there is a concurrent skew in terms of having children in vacationers' households (index = 122).

In terms of home ownership, though, vacationers appear to be fairly similar to the population as a whole.

Finally, let us look at total family annual income before taxes and ownership of what might be called "lifestyle" items.

BASE:	Wash: Wghtd X1.58 790	Ore 500	Wghtd Total 1290	1980 Census Data (NA)	Index (NA)
Income					
Under $15,000	13%	11%	13%	42%	31
$15,000-$24,999	21	25	23	28	82
$25,000-$34,999	25	22	24	17	141
$35,000-$49,999	17	17	17	9	188
$50,000 or more	14	14	14	4	350
Refused	10	11	10	NA	NA
Ownership Of Lifestyle Items					
Backpack	56%	61%	58%	NA	NA
Cable Television	60	55	58	NA	NA
Pick-Up/Jeep/LUV	47	49	48	NA	NA
Video Cassette Recorder	41	41	41	NA	NA
Snow skis	38	39	38	NA	NA
16' Or Longer Boat	21	15	18	NA	NA
Vacation Travel Trailer	12	13	13	NA	NA
Camper	12	13	12	NA	NA
Vacation Home/Time Share	8	11	9	NA	NA

Predictably, there is a skew in terms of vacationers having incomes higher than the population as a whole. Moreover, as incomes rise past $25,000, the tendency to become a vacationer rises dramatically (indices = 141, 188 and 350!).

Although there are no census statistics available for comparison of the data concerning ownership of "lifestyle" items, these data add a complementary dimension to the demographic statistics. For example, it is interesting to note that cable television is as widely distributed as backpacks among vacationers (58%). As a result, cable might be worth investigating as an alternative advertising medium for British Columbia tourism.

In summary, these demographics reveal that Washington and Oregon vacationers tend to concentrate in the 35 to 44 age group, be better educated, live in households of about four persons, and have household incomes often in excess of $25,000 per year.

# #

APPENDICES

TRAVEL STUDY -- SCREENER -- OREGON VERSION (1-4)

M.L. MOSS & COMPANY/ALTAIR RESEARCH, INC. PROJECT #3206

TELEPHONE # (_______)____

RESPONDENT NAME____

DATE______________________INTERVIEWER ID/INITIALS___________________

Oregon -2 (6)

Male -1 (7)
Female -2

Metro Portland/Vancouver -1 (8)
Metro Eugene -2
Metro Salem -3
Metro Medford -4

Respondent Age Group________ A(9)

End time_________ Start time__________ Total time______________ A(10-11)

Hello, this is ____________________ of Altair Research, a Seattle opinion research firm. We are calling [long distance] today/tonight to talk to people 21 years of age and older on the subject of vacation travel.

1. Are you a member of this household and 21 years of age or older?

Yes.....-1 No.....-2 --> NOT QUALIFIED RESPONDENT A(12)

[IF NO, ASK TO SPEAK WITH HOUSEHOLD MEMBER 21 OR OLDER. REINTRODUCE YOURSELF. IF NO ONE AVAILABLE, TERMINATE INTERVIEW.]

2. Are you, personally, responsible for or do you have an important say in your household's vacation travel decisions?

Yes.....-1 No.....-2 --> ASK TO SPEAK WITH HOUSEHOLD MEMBER WHO QUALIFIES. IF NONE AVAILABLE, TERMINATE. A(13)

3. In the past 2 years have you, personally, taken a vacation lasting at least two nights?

4. In the past 2 years have you, personally, taken a vacation traveling a minimum distance from your home of 350 miles one way?

Q3	Q4			
Yes..-1	Yes..-1	---->	IF ONLY ONE "YES," GO ON TO Q5. IF BOTH "YES," SKIP TO Q6.	A(14)
No...-2	No...-2	---->	IF ONE OR MORE "NO," GO TO Q5.	A(15)

5. Do you intend to take a vacation lasting at least two nights and traveling a minimum distance from your home of 350 miles one way within the next 12 months?

Yes/Probably --> NOT SEX AND GO TO
............-1 WHITE QUESTIONNAIRE

No --> TERMINATE
...-2 A(16)

6. Now I'd like you to think about only those vacations that you have taken in the past 2 years to places more that 350 miles from home and where you stayed at least two nights away from home. How many of these vacations that you have taken since November 1982 were just 2 to 6 nights long?

7. How many of these vacations were at least 7 nights or longer?

Q6 |___|___| 2-6 Night Vacations (9) (10)

Q7 |___|___| 7+ Night Vacations (11) (12)

IF 01 OR MORE IN Q6, USE GREEN Q'AIRE. IF 01 OR MORE IN Q7, USE BLUE Q'AIRE. IF 00 IN BOTH Q6 AND Q7, TERMINATE.

(13)
Open

TRAVEL STUDY -- OREGON VERSION

(14)
(15)

REFER TO Q 6. IF RESPONDENT HAS TAKEN MORE THAN ONE "2-6 NIGHT" VACATION USE THE PHRASE "MOST RECENT" WHERE APPROPRIATE.

1. How many nights were you actually away on the [most recent] 2 to 6 night vacation traveling at least 350 miles one way?

One.........-1
Two.........-2
Three.......-3
Four........-4
Five.......-5
Six........-6
DK/DR......-7

(16)

2. Approximately how much time in advance of that vacation did you start to make plans for it? By "make plans" I mean start thinking or gathering information about where you might like to go on that vacation, or take other actions. DO NOT READ LIST

No advance plans made...........................-1
Two weeks or less...............................-2
More than two weeks but less than two months..-3
Two to four months..............................-4
Five to six months..............................-5
More than six months............................-6
DK/DR...-7

(17)

3. Please think about the type of area that you visited on that [most recent] 2 to 6 night vacation. Would you describe it as...

A big city..........................01
A smaller town......................02
A national park or forest...........03
A resort area....................... 04
The oceanside....................... 05
A mountainous or wilderness area............................06
A non-mountainous, non-wilderness countryside area.................07
(DO NOT READ) DK/DR................08

(18)
(19)

4. Did you take your [most recent] 2 to 6 night vacation more than 350 miles away in the United States or in some other country.

United States.............-1
Some other country.........-2
Both in the US and some other country...-3

(20)

5. What was the furthest state or country that you visited?

Canada..................................-1
Mexico..................................-2
Other country (Specify)________________
____
USA (Specify state)____________________

--) SKIP TO Q8 (Mexico, Other country, USA)

Use (14-15) Above

6. Where did you go in Canada?

BRITISH COLUMBIA [Vancouver Vancouver Island, Victoria, Butchart Gardens, Kimberley Whistler/Blackcomb, The Okanagan Valley, Harrison Hot Springs, Radium Hot Springs, BC Rockies]........-1	OTHER PROVINCES/DESTINATIONS [Alberta, Manitoba, New Brunswick, Newfoundland, Nova Scotia, Northwest Territories, Ontario, Prince Edward Island, Quebec, Saskatchewan, Yukon]........-2
--) ALSO CHECK BOX ON AUX. CARD 1	--) SKIP TO Q8

(22)

7. Where did you go in British Columbia? (PROBE:) Where else?

Vancouver (city).......01
Vancouver Island.......02
Victoria...............03
Butchart Gardens.......04
Kimberley..............09

Whistler/Blackcomb.....05
The Okanagan (Valley)..06
Harrison Hot Springs...07 (23-28)
Radium Hot Springs.....08
BC Rockies.............10

Other (Specify)____

____

8. What mode of transportation did you use to get to your vacation destination and back? DO NOT READ LIST

Airline.........................01
Train...........................02
Bus.............................03
Cruise ship.....................04
Car/truck/van...................05
Recreational vehicle............06 (29-30)
Motorcycle......................07
Private boat....................08

Other (Specify)___________________ (31) Open

9. What type of accommodations did you use on that vacation? DO NOT READ LIST.

Hotel/motel.............................01
Tourist home/guest house/
rented cottage/cabin.................02
Campground/trailer park.................03
Stayed on road in car/truck/
van/recreational vehicle.............04
Stayed on cruise ship...................05
Stayed on private boat..................06 (32-33)
Stayed at vacation place owned
by respondent's family...............07
Stayed at friends/relatives.............08

Other (Specify)_________________________ (34) Open

10. Did a travel agent help to arrange either the transportation or the accommodations for that vacation?

Yes......-1 No.......-2 (35)

11. Did that vacation include the rental of a car?

Yes......-1 No.......-2 (36)

12. Was all or any part of that vacation a part of a package deal that included transportation, accommodations, or both?

Yes......-1 No.......-2 (37)

13. Did you visit friends or relatives on that vacation?

Yes......-1 No.......-2 (38)

14. Was any work-related business conducted on that vacation?

Yes......-1 No.......-2 (39)

15. Did any children age 18 or under accompany you?

Yes......-1 No.......-2 (40)

16. Regardless of age, how many people including yourself went on that vacation? RECORD VERBATIM AND CLASSIFY BELOW IF POSSIBLE.

____________________ Persons
(41-42)

One............-1
Two............-2
Three-Four.....-3
Five or more...-4

(43)

17. People have different motives for taking a vacation. I will read several possible motives to you; when I am finished, please tell me which one was the single most important motive for wanting to take that vacation. BEGIN WITH CHECKED ITEM. READ THROUGH ENTIRE LIST. IF NECESSARY, PRESS RESPONDENT TO MAKE ONE CHOICE.

To have a change of scene or see the sights....-1
To be active such as playing tennis, fishing, skiing, etc........................-2
To be inactive, rest and relax................-3
To experience a change in climate.............-4
To entertain the children.....................-5
To visit relatives............................-6
[DO NOT READ] DK/NA........................... -7

(44)

18. Approximately how much in total did your household spend on that vacation, that is, what did the whole vacation end up costing? DO NOT READ LIST. RECORD ANSWER VERBATIM, THEN CLASSIFY IF POSSIBLE.

Under $300 -1
$300-$499 -2
$500-$999 -3
$1000-$1999 -4
$2000-$2999 -5
Over $3000 -6
DK/NA -7

(49)

____
DOLLARS
(45-48)

19. Did you take this [most recent] 2 to 6 night vacation in the spring, summer, fall or winter?

Spring...........-1
Summer...........-2
Fall.............-3
Winter...........-4

(50)

(51-53)
open

(54)
(55)

REFER TO Q7. IF RESPONDENT HAS TAKEN MORE THAN ONE "7 NIGHT OR LONGER" VACATION USE THE PHRASE "MOST RECENT" WHERE APPROPRIATE.

20. (Now) let's talk about your [most recent] 7 nights or longer vacation at least 350 miles away. How many nights were you actually away on that vacation? RECORD EXACT NUMBER AND CLASSIFY

|___|___| Nights
(56) (57)

Seven nights only.........-1
Eight-fourteen nights.....-2 (58)
Fifteen or more nights...-3

21. Approximately how much time in advance of that vacation did you start to make plans for it? By "make plans" I mean start thinking or gathering information about where you might like to go on that vacation, or take other actions. DO NOT READ LIST

No advance plans made..........................-1
Two weeks or less..............................-2
More than two weeks but less than two months..-3
Two to four months.............................-4 (59)
Five to six months.............................-5
More than six months...........................-6
DK/DR..-7

22. Please think about the type of area that you visited on that [most recent] 7 night or longer vacation. Would you describe it as...

A big city.........................01
A smaller town.....................02
A national park or forest..........03
A resort area...................... 04
The oceanside...................... 05 (60-61)
A mountainous or wilderness area...........................06
A non-mountainous, non-wilderness countryside area................07
(DO NOT READ) DK/DR................08

23. Did you take your [most recent] 7 night or longer vacation more than 350 miles away in the United States or in some other country?

United States................-1
Some other country...........-2 (62)
Both in the US and some other country....-3

24. What was the furthest state or country that you visited?

Canada.................................-1
Mexico.................................-2 ┐
Other country (Specify)_______________ |
_______________________________________ |--> SKIP TO Q27 Use (54-55) Above
USA (Specify state)___________________ ┘

25. Where did you go in Canada?

BRITISH COLUMBIA [Vancouver Vancouver Island, Victoria, Butchart Gardens, Kimberley Whistler/Blackcomb, The Okanagan Valley, Harrison Hot Springs, Radium Hot Springs, BC Rockies].........-1	OTHER PROVINCES/DESTINATIONS [Alberta, Manitoba, New Brunswick, Newfoundland, Nova Scotia, Northwest Territories, Ontario, Prince Edward Island, Quebec, Saskatchewan, Yukon]........-2 (64)
--> ALSO CHECK BOX ON AUX. CARD 1	--> SKIP TO Q27

26. Where did you go in British Columbia? (PROBE:) Where else?

Vancouver (city).......01
Vancouver Island.......02
Victoria...............03
Butchart Gardens.......04
Kimberley..............09
Whistler/Blackcomb.....05
The Okanagan (Valley)..06
Harrison Hot Springs...07
Radium Hot Springs.....08
BC Rockies.............10

(65-70)

Other (Specify)____

____

27. What mode of transportation did you use to get to your [most recent] 7 night or longer vacation destination and back? DO NOT READ LIST

Airline........................01
Train..........................02
Bus............................03
Cruise ship....................04
Car/truck/van..................05 (71-72)
Recreational vehicle...........06
Motorcycle.....................07
Private boat...................08

Other (Specify)__________________

(73) Open

28. What type of accommodations did you use on that vacation? DO NOT READ LIST.

Hotel/motel.............................01
Tourist home/guest house/
rented cottage/cabin.................02
Campground/trailer park.................03
Stayed on road in car/truck/
van/recreational vehicle.............04
Stayed on cruise ship...................05 (74-75)
Stayed on private boat..................06
Stayed at vacation place owned
by respondent's family...............07
Stayed at friends/relatives.............08

Other (Specify)______________________

(76) Open

29. Did a travel agent help to arrange either the transportation or the accommodations for that vacation?

Yes......-1 No.......-2 (77)

30. Did that vacation include the rental of a car?

Yes......-1 No.......-2 (78)

31. Was all or any part of that vacation a part of a package deal that included transportation, accommodations, or both?

Yes......-1 No.......-2 (79)

32. Did you visit friends or relatives on that vacation?

Yes......-1 No.......-2 (80)

33. Was any work-related business conducted on that vacation?

Yes......-1 No.......-2 (81)

34. Did any children age 18 and under accompany you?

Yes......-1 No.......-2 (82)

35. Regardless of age, how many people including yourself went on that vacation? RECORD NUMBER VERBATIM AND CLASSIFY BELOW IF POSSIBLE.

______________ Persons
(83-84)

One............-1
Two............-2
Three-Four.....-3
Five or more...-4

(85)

36. People have different motives for taking a vacation. I will read several possible motives to you; when I am finished, please tell me which one was the single most important motive for wanting to take that vacation. BEGIN WITH CHECKED ITEM. READ THROUGH ENTIRE LIST. IF NECESSARY, PRESS RESPONDENT TO MAKE ONE CHOICE.

Main
Motive

To have a change of scene or see the sights....-1
To be active such as playing tennis,
fishing, skiing, etc..........................-2
To be inactive, rest and relax.................-3
To experience a change in climate..............-4
To entertain the children......................-5
To visit relatives.............................-6
[DO NOT READ] DK/NA........................... -7

(86)

37. Approximately how much in total did your household spend on that vacation, that is, what did the whole vacation end up costing? DO NOT READ LIST. RECORD ANSWER VERBATIM, THEN CLASSIFY IF POSSIBLE.

____
DOLLARS
(87-90)

Under $300 -1
$300-$499 -2
$500-$999 -3
$1000-$1999 -4
$2000-$2999 -5
Over $3000 -6
DK/NA -7

(91)

38. Did you take this [most recent] 7 night or longer vacation in the spring, summer, fall or winter?

Spring...........-1
Summer...........-2
Fall.............-3
Winter...........-4

(92)

(93-99)
open

39. (Now) I am going to read you a list of statements people have made about vacations. For each statement please tell me how much you agree or disagree that it describes you yourself. The first statement is...[START WITH CHECKED ITEM]

READ STATEMENT AT LEAST 3 TIMES: Do you "strongly agree," "tend to agree," "tend to disagree," or "strongly disagree"?

	Q39					
	Strongly Agree	Tend To Agree	Tend To Disagree	Strongly Disagree	DK	
You like to go to a different place on each new vacation......	-1	-2	-3	-4	-X	(100)
You think "roughing it" is just fine on a vacation.............	-1	-2	-3	-4	-X	(101)
Your vacation is mainly for rest and relaxation.................	-1	-2	-3	-4	-X	(102)
You like to make all of your arrangements before going on vacation....................	-1	-2	-3	-4	-X	(103)
In any one year you would rather take a number of short vacations instead of one long one..	-1	-2	-3	-4	-X	(104)
You like the idea of paying one price that covers both transportation and accommodations...	-1	-2	-3	-4	-X	(105)
You like to be around people on your vacation.................	-1	-2	-3	-4	-X	(106)
Your vacation is for getting out and doing things...........	-1	-2	-3	-4	-X	(107)
It is important that other people you encounter on your vacation understand English....	-1	-2	-3	-4	-X	(108)
For vacations of just a few days, you have to be able to get there in 4 hours or less...	-1	-2	-3	-4	-X	(109)
You have to know something about the spot before you go to it...	-1	-2	-3	-4	-X	(110)
You like to see as much as possible in the time available....	-1	-2	-3	-4	-X	(111)
You like to choose vacation spots that you've heard about from friends...................	-1	-2	-3	-4	-X	(112)

40. Compared to the past, do you think you will take more, the same or fewer vacations in the next few years?

More.......................-1
The same...................-2
Fewer......................-3 (113)
DK.........................-4
Have taken no trips.......-5 ---) SKIP TO Q42

41. Compared to the past, do you think you will spend more, the same or less money on vacations in the next few years?

More.......................-1
The Same...................-2
Less.......................-3 (114)
DK.........................-4

42. How important is it to you -- "very important," "somewhat important," or "not at all important" -- that you are able to do or have the following things when on vacation? Is it "very important," "somewhat important," or "not at all important" that you are able to...[INSERT ITEM]? BEGIN WITH CHECKED ITEM.

	Q42				Q44				
	Very Imp.	Somewhat Imp.	Not At All Imp.	DK	Good	Fair	Poor	DK NA	
Get a good sun tan	-1	-2	-3	-X	-1	-2	-3	-X	(115/143)
Attend entertainment events such as plays & live theater	-1	-2	-3	-X	-1	-2	-3	-X	(116/144)
Enjoy the outdoors	-1	-2	-3	-X	-1	-2	-3	-X	(117/145)
Visit cultural attractions such as museums & art exhibits	-1	-2	-3	-X	-1	-2	-3	-X	(118/146)
Visit important historic places	-1	-2	-3	-X	-1	-2	-3	-X	(119/147)
Get away from people	-1	-2	-3	-X	-1	-2	-3	-X	(120/148)
Go places you've never been to before	-1	-2	-3	-X	-1	-2	-3	-X	(121/149)
Be treated as though you're "invited"	-1	-2	-3	-X	-1	-2	-3	-X	(122/150)
Be together as a family	-1	-2	-3	-X	-1	-2	-3	-X	(123/151)
Visit relatives	-1	-2	-3	-X	-1	-2	-3	-X	(124/152)
Entertain the children	-1	-2	-3	-X	-1	-2	-3	-X	(125/153)
Dine at fancy restaurants	-1	-2	-3	-X	-1	-2	-3	-X	(126/154)
Stay in fancy accommodations	-1	-2	-3	-X	-1	-2	-3	-X	(127/155)
Have plenty of exciting nightlife	-1	-2	-3	-X	-1	-2	-3	-X	(128/156)
Visit a cosmopolitan city	-1	-2	-3	-X	-1	-2	-3	-X	(129/157)
Visit a national park or forest	-1	-2	-3	-X	-1	-2	-3	-X	(130/158)
Gamble	-1	-2	-3	-X	-1	-2	-3	-X	(131/159)
Shop for things you can't get at home	-1	-2	-3	-X	-1	-2	-3	-X	(132/160)
Experience a different culture	-1	-2	-3	-X	-1	-2	-3	-X	(133/161)
Experience a change of climate	-1	-2	-3	-X	-1	-2	-3	-X	(134/162)
Experience a change of scenery	-1	-2	-3	-X	-1	-2	-3	-X	(135/163)
Have plenty of things for the children to do	-1	-2	-3	-X	-1	-2	-3	-X	(136/164)
Be able to go to a major amusement or theme park	-1	-2	-3	-X	-1	-2	-3	-X	(137/165)
Camp out	-1	-2	-3	-X	-1	-2	-3	-X	(138/166)
Get a high value for your vacation dollar	-1	-2	-3	-X	-1	-2	-3	-X	(139/167)
Travel on a package plan for both transportation and accommodations	-1	-2	-3	-X	-1	-2	-3	-X	(140/168)
Get to your destination fairly quickly	-1	-2	-3	-X	-1	-2	-3	-X	(141/169)
Participate in sports and activites	-1	-2	-3	-X	-1	-2	-3	-X	(142/170)

43. Which sports and activities? READ ENTIRE LIST.

	Yes	No	DK			Yes	No	DK	
Golf	-1	-2	-X	(171)	Cross-country snow skiing	-1	-2	-X	(178)
Tennis	-1	-2	-X	(172)	Downhill snow skiing	-1	-2	-X	(179)
Water skiing	-1	-2	-X	(173)	Scuba diving	-1	-2	-X	(180)
Swimming	-1	-2	-X	(174)	Lake or stream fishing	-1	-2	-X	(181)
Hunting	-1	-2	-X	(175)	Warm water sports such as snorkeling	-1	-2	-X	(182)
Ocean fishing	-1	-2	-X	(176)	Canoeing/boating/kayaking	-1	-2	-X	(183)
River rafting	-1	-2	-X	(177)					

44. Even though some people know less about British Columbia than others, everyone has some impressions about what it would be like to take a vacation there. What is your impression as to how British Columbia would rate -- "good," "fair," or "poor" -- as a vacation spot where you can...[INSERT ITEM]? READ ENTIRE LIST. USE GRID ABOVE. USE FOLLOW-UP PHRASE "WOULD YOU RATE B.C. GOOD, FAIR OR POOR AS A PLACE TO..."

(184-190)
open

REFER TO AUXILIARY CARD 1. IF PROPER RESPONSES ARE INDICATED, ASK Q45.
[RESPONDENT MUST NOT HAVE TRAVELED TO BRITISH COLUMBIA.]

45. Have you ever been on vacation in British Columbia, staying two nights or longer?

Yes.....-1   No.....-2 --> SKIP TO Q49 (191)

46. Approximately how many times have you ever been on vacation in British Columbia? RECORD NUMBER VERBATIM AND CLASSIFY IF POSSIBLE

______________________	One...........-1
Total number of vacations	Two...........-2
in British Columbia	Three-Five.....-3
(192-193)	Six or more...-4
	DK/DR.........-5

(194)

47. In what year did you take your most recent vacation to British Columbia? DO NOT READ LIST. CIRCLE BOTH YEAR AND CODE NUMBER IF POSSIBLE

1982, 1983, 1984 (0-2 years ago)............-1
1979, 1980, 1981 (3-5 years ago)............-2
1975, 1976, 1977, 1978 (6-9 years ago)......-3 (195)
1974 or previous (10 or more years ago).....-4
DK/DR.......................................-5

48. Where have you ever gone while on vacation in British Columbia? (PROBE:) Where else? DO NOT READ LIST. (196-203)

Vancouver (city).................................01
Vancouver Island.................................02
Victoria...03
Butchart Gardens.................................04
Whistler/Blackcomb...............................05
The Okanagan (Valley)............................06
Harrison Hot Springs.............................07
Radium Hot Springs...............................08
Kimberley..09
BC Rockies.......................................10

Other (Specify)____________________________________

____

____

49. Are you "very interested," "only moderately interested" or "not at all interested" in vacationing in British Columbia for at least two nights or longer in the next 12 months?

Very interested..............-1
Only moderately interested...-2
--> SKIP TO Q51 (204)
Not at all interested........-3
DK...........................-4

50. ONLY IF "NOT AT ALL INTERESTED": Why do you feel that way? (205-208)

____

____

____

---> GO TO Q51 THEN SKIP TO Q 55.

51. Would your interest in taking a vacation in British Columbia increase, decrease, or stay the same if...

	Q51				
	Increase	Decrease	Stay Same	DK	
You could find well-priced all-inclusive trips to British Columbia including transportation, accommodations, or both......................	-1	-2	-3	-4	(209)
A major amusement or theme park were to open in British Columbia.........	-1	-2	-3	-4	(210)
You had more information about where to go and what to do in British Columbia.......................	-1	-2	-3	-4	(211)
You were assured that the scenery in British Columbia was more dramatic, majestic and unspoiled than what is available in Oregon........	-1	-2	-3	-4	(212)
You had some concrete idea as to how British Columbia is different from what is already available in Oregon.....	-1	-2	-3	-4	(213)
You found out there will be a major world exposition in Vancouver, British Columbia in 1986.......................	-1	-2	-3	-4	(214)

REFER TO Q49. ASK Q52-54 ONLY IF RESPONDENT IS "VERY" OR "MODERATELY" INTERESTED IN VACATIONING IN BRITISH COLUMBIA, OR "DON'T KNOW."

52. If you were to take a vacation in British Columbia in the next 12 months, where would you probably go? DO NOT READ LIST. (Probe:) Where else?

DOUBLE CODE: FIRST CIRCLE NUMBER(S) APPROPRIATE FOR Q52; THEN ALSO CIRCLE -1 FOR EACH MENTIONED ITEM UNDER "VERY INT." FOR Q53.

53. FOR EACH UNMENTIONED, LISTED ITEM: If you were to take a vacation to British Columbia in the next 12 months, would you be "very interested," "moderately interested" or "not at all interested" in going to...[INSERT ITEM]? REREAD CLASSIFICATIONS FOR EACH ITEM.

54. FOR EACH "NOT AT ALL INTERESTED" ITEM: Why do you feel that way about... [INSERT ITEM]? WRITE VERBATIMS IN SPACES PROVIDED ON NEXT PAGE.

	Q52	Q53					Q54
	Would Go	Very Int.	Mod. Int.	Not At All Int.	DK		Reasons For No Interest
Vancouver (city)..........	01	-1	-2	-3	-X	(221)	
Vancouver Island..........	02	-1	-2	-3	-X	(222)	
Victoria..................	03	-1	-2	-3	-X	(223)	
Butchart Gardens..........	04	-1	-2	-3	-X	(224)	[WRITE IN ON NEXT PAGE.]
Whistler/Blackcomb........	05	-1	-2	-3	-X	(224)	
The Okanagan (Valley).....	06	-1	-2	-3	-X	(225)	
Harrison Hot Springs......	07	-1	-2	-3	-X	(226)	
BC Rockies................	08	-1	-2	-3	-X	(227)	

Other (Specify)________________

______________________________ (215-220)

____

Q54 -- WHY RESPONDENTS ARE NOT INTERESTED IN GOING TO...

Vancouver (city)____
229-
-- 230-
231-
-- 232-

Vancouver Island ____
233-
-- 234-
235-
-- 236-

Victoria ____
237-
-- 238-
239-
-- 240-

Butchart Gardens____
241-
-- 242-
243-
-- 244-

Whistler/Blackcomb____
245-
-- 246-
247-
-- 248-

The Okanagan (Valley) ____
249-
-- 250-
251-
-- 252-

Harrison Hot Springs ____
253-
-- 254-
255-
-- 256-

BC Rockies ____
257-
-- 258-
259-
-- 260-

55. In the past several months, do you recall seeing or hearing any advertising for British Columbia?

Yes.....-1   No.....-2 --) SKIP TO Q59   (261)

56. What do you remember from the advertising for British Columbia? (PROBE:) What else?

____ (262-265)

____

57. Thinking of the advertising you have seen or heard for British Columbia, which of the following do you remember? Again, this is advertising specifically for British Columbia only. Do you remember seeing or hearing any British Columbia advertising which included...? READ ENTIRE LIST.

	Yes	No		
The phrase "America Borders On The Magnificent.	-1	-2	(266)	
The phrase "Super, Natural"	-1	-2	(267)	
The phrase "Come On Up"	-1	-2	(268)	SKIP TO Q59
Ski slopes	-1	-2	(268)	
Good currency exchange rates	-1	-2	(269)	
The Canadian Minister of Tourism	-1	-2	(270)	
Package deals	-1	-2	(271)	
Beautiful scenery	-1	-2	(272)	
	-1	-2	(273)	

58. Are you sure that the advertising you saw which showed beautiful scenery was an ad for British Columbia?

Yes.....-1   No.....-2   (274)

59. Which of the following best describes you as a snow-skier?

A person who does not ski and probably would not if the opportunity arose...................-1

An inactive skier with a fairly low probability of engaging in the sport in the future..........-2 --) SKIP TO Q63

A person who does not now ski but who probably would if the opportunity arose.................-3   (275)

An active skier who regularly or occasionally engages in the sport............................-4

60. Which type of skiing are you most interested in -- downhill or cross-country?

Downhill..............-1
Cross-country.........-2
Both equally..........-3   (276)

61. Which ski areas in British Columbia are you aware of? (PROBE:) What others can you think of? DO NOT READ LIST.

62. FOR EACH UNMENTIONED ITEM: Have you ever heard of [INSERT ITEM] in British Columbia? FOLLOW UP QUESTION: "How about...?

	Q61 Aware			Q62 Heard Of		
	Yes	No		Yes	No	
Whistler/Blackcomb						
Panorama	-1	-2	(277)	-1	-2	(287)
Red Mountain (in Rossland)	-1	-2	(278)	-1	-2	(288)
Big White	-1	-2	(279)	-1	-2	(289)
Silver Star	-1	-2	(280)	-1	-2	(290)
Tod Mountain	-1	-2	(281)	-1	-2	(291)
Mount Washington	-1	-2	(282)	-1	-2	(292)
Apex/Alpine	-1	-2	(283)	-1	-2	(293)
Fernie (Snow Valley)	-1	-2	(284)	-1	-2	(294)
	-1	-2	(285)	-1	-2	(295)

Other (Specify)_______________________(286)

63. Now I have a few general questions just to help us group the answers from everyone we are talking to. Which of these groups best describes your age? READ LIST

21 to 25....................-1
26 to 34....................-2
35 to 44....................-3
45 to 54....................-4 (296)
55 to 64....................-5
65 Or Over..................-6
[DO NOT READ] Refused.......-7

64. What is the highest level of education that you have achieved? READ LIST.

Some high school..........-1
Completed high school.....-2
Some or all of college
or vocational school (297)
after high school.......-3
[DO NOT READ] Refused....-4

65. Including yourself, how many people live in your household?

One........................-1
Two........................-2
Three......................-3
Four.......................-4 (298)
Five or more...............-5
[DO NOT READ] Refused......-6

66. How many persons in your household are age 18 or under? RECORD EXACT NUMBER

|___|___| Persons (299-300)

| DOUBLE CODE: PRESENCE OF CHILDREN 18 & UNDER |
| Yes....-1 No.....-2 | (301)

67. Do you own or rent the home you are currently living in?

Own...................-1
Rent..................-2
Other.................-3 (302)
[DO NOT READ] Refused.-4

68. Do you or anyone else in your household own or have...

	Yes	No	DK	
A boat 16 feet or longer..........................	-1	-2	-X	(303)
A vacation travel trailer.........................	-1	-2	-X	(304)
A camper..	-1	-2	-X	(305)
A backpack..	-1	-2	-X	(306)
A pair of snow skis...............................	-1	-2	-X	(307)
A pick-up truck, jeep or light utility vehicle..	-1	-2	-X	(308)
A video cassette recorder.........................	-1	-2	-X	(309)
A vacation home or time-share condominium.........	-1	-2	-X	(310)
Cable television..................................	-1	-2	-X	(311)

69. Which of these groups best describes your total annual household income before taxes?

Under $15,000...............-1
$15,000 - $24,999...........-2
$25,000 - $34,999...........-3
$35,000 - $49,999...........-4 (312)
$50,000 or more.............-5
[DO NOT READ] Refused/DK....-6

"Your opinions have been very helpful and I appreciate the time you have taken to participate in this study. Thank you."

| ATTACH SCREENER TO INTERVIEW. RECORD TIME INTERVIEW ENDED ON FRONT AND CALCULATE TOTAL TIME OF INTERVIEW. BE SURE NAME, SEX, AGE GROUP, AREA CODE AND TELEPHONE NUMBER ARE RECORDED ON SCREENER. |

A QUALITATIVE INVESTIGATION
OF THE
WASHINGTON AND OREGON TRAVEL MARKET

FOR

THE MINISTRY OF TOURISM,
BRITISH COLUMBIA

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BACKGROUND AND OBJECTIVES

The Ministry of Tourism, British Columbia, is seeking to enhance its understanding of the Washington and Oregon travel market. A two-part research study has been designed to gather information which can be used to market British Columbia more effectively as a travel destination.

The exploratory first phase of this study is the basis for this report. Specific objectives of this phase were as follows:

1) To identify motivations and behavior of Washington-Oregon consumers regarding travel destination selection;

2) To explore awareness of and experience with B.C. as a travel destination among Washington-Oregon consumers;

3) To uncover perceived barriers to selection of B.C. as a travel destination;

4) To assess current awareness of B.C. destination advertising; and

5) To develop hypotheses and question areas for inclusion in the qualitative second phase of this research.

METHODOLOGY

This exploratory phase was accomplished with a series of three focus group interviews in each market. Qualified respondents were pre-screened to meet the following criteria:

- Each had taken a vacation of at least three days and at least 250/350 miles during the past year, and intended to do so again in the next year.
- Each was between the ages of 21 and 64.
- Each had a primary role in planning vacations and selecting the destination.

Additionally, one group in each market was segmented as follows:

Group I - have travelled to B.C. and plan to go again.
Group II - have travelled to B.C. and do not plan to go again.
Group III - have not travelled to B.C. and one-half plan to go while the other half do not plan to go.

Each of the six groups consisted of both men and women; and age groups represented a cross-section of the population.

The moderator began each group with the usual focus group introduction and warm-up, and then proceeded to explore respondents' travel history. This included destination selection, planning process, and experience with British Columbia.

B.C. travellers were asked a series of questions about their experiences there, while those without B.C. experience discussed reasons for not going, including perceptions of B.C.

Respondents were led through an assessment of a variety of activity opportunities and environmental elements (climate, service, scenery, etc.). They were then asked to construct an ideal "package" trip to British Columbia, incorporating as many elements as they saw fit.

Group members were finally shown an assortment of "Super Natural" print ads for B.C., and discussed recall and impressions. Those from Seattle who had visited B.C. in the past also saw and discussed four "Super Natural" commercials.

A focus group session is a qualitative interviewing technique which encourages candid discussion of a particular topic within a group of eight or so participants. Interviews are conducted by a trained moderator whose major goal is to direct discussion toward relevant areas. Typically, respondents are chosen for particular attributes, usually as part of the target market of the service under investigation. Groups are generally composed of individuals with similar life-style orientations, and comparisons are often made among groups.

Although a focus group interview is not designed to collect statistically significant information, it is an extremely useful technique for exploring a specific issue in some detail. In evaluating consumer attitudes, dispositions and needs, it is an excellent method for eliciting relevant information; and interview results should be interpreted with this in mind.

SUMMARY OF FINDINGS

From this exploratory phase of research, a number of hypotheses can be constructed regarding the attitudes of travellers in Washington and Oregon. The major finding is this:

- U.S. travellers need to know more about British Columbia. This is particularly the case, of course, among current non-consumers, but also true among repeat visitors as close as Seattle. These travellers do not come to B.C. if they don't know what to do once they arrive.

Other key hypotheses are as follows:

- To many U.S. travellers, British Columbia is defined solely by Vancouver and Victoria. Among non-travellers or one-time visitors, this is often narrowed down to Buchart Gardens and the ferries, while Vancouver is seen as just another big city without intrinsic appeal.
- Travellers return to destinations because they offer a "guaranteed" experience, built upon good memories. They know how much the trip will cost, how to get there, and what the destination has to offer. The risk associated with travelling to a new destination is greatly offset by the ready availability of information.

- Word of mouth appears to be the primary reliable source of vacation destination information. Other forms of advertising, such as newspaper travel sections, travel magazines and auto club literature are most helpful when they provide specific information and a source to write or call for more.

- British Columbia seems most appealing to U.S. travellers when it is presented as a foreign country, distinctly different from the U.S. northwest. Because Oregon and Washington are scenically similar, place names and locations are an important differentiation.

- British Columbia's climate is seen as basically similar to that in the U.S. northwest. To repeat visitors, climate is rarely an issue. To one-time or non-visitors, a summer climate provides the greatest appeal.

- Awareness of previous B.C. advertising is fairly low, and correlates directly with traveller's familiarity with B.C. Advertising consisting primarily of scenic views is felt to be appealing, yet the absence of specific destination information discourages interest in travelling to B.C.

- The common concept of a package tour is too restrictive for most of these travellers. Most, however, respond favorably to the notion of a fixed-price and/or prepaid travel package including accommodations, some meals, and something to do.

- Many U.S. travellers find the prospect of a "guided" wilderness experience appealing, but they are not aware of them nor do they know how to arrange one.

DETAILED FINDINGS

Attitudes, interests and behavior among these respondents appear to derive from their past travel experiences, rather than from place of residence. Portland and Seattle group members with similar B.C. travel experience and expectations (Group I, Group II, etc.) have therefore been combined for the purpose of the following analysis. Differences attributable to place of residence are noted where they occur.

Travel History/Destination Selection

Group I respondents - B.C. travellers who plan to return - represent generally active travellers. They have visited a variety of places for a variety of reasons.

Most of these respondents had taken four or more trips in the past year. For many, at least one trip was to a distant part of the U.S. Most long trips involved a significant amount of travel, while short trips tended to be to the coast or elsewhere in-state. Among Washington residents, trips to Vancouver or Victoria tended to be among the short, weekend trips.

Expenses were difficult to pin down, here as elsewhere. Many trips involved camping, where food expenses were nominal (or normal), lodging was inexpensive, and the greatest proportion of expenses went to transportation and miscellaneous entertainment.

Non-camping trips nearby required expenses split evenly between food, lodging and entertainment. Long distance travel shifted the emphasis to travel and food/lodging, evenly.

Among Groups II and III, recent travel was confined mostly to the Northwest, with an occasional major trip abroad. These respondents travel less often than Group I participants.

Destination selection was as varied a process as was the list of vacation spots visited. Several distinct patterns emerged, however, most of which were voiced by respondents in each group.

Some trips were to visit relatives or friends, where the ultimate destination is a secondary factor in the decision to go.

Other trips were once-in-a-lifetime types of vacations, involving opportunities to go to Europe or a gift or prize.

A third type was a business trip with elements of a vacation included. Most of these involved the respondent and spouse, and combined business with a scenic route or an extra few days touring.

Another common trip involved a routine or regularly occurring trip to a favorite location. The destinations mentioned most often in this context were Reno/Tahoe and the coast. Other repeat locations included family-owned cabins, the San Juans (among Washingtonians), and Vancouver or Victoria among Group I respondents.

Respondents return to these locations primarily because they have had a good experience and know what to expect when they go back. The location represents good memories, and something of a guarantee. Several participants used the word "reliable" to describe a repeat destination. Others indicated that they liked knowing in advance how much they would need to spend, and how to get from place to place.

Respondents with children at home select some destinations primarily on the basis of activities for children as well as accommodation to them - restaurants and lodging receptive to children, limited driving, inexpensive modes of transportation, etc. Most child-oriented trips required outdoor activities and places to play or swim, as well as a casual atmosphere. Good weather is often a factor in planning trips with children.

Most respondents with children also plan adult vacations for themselves. These tend to be short, weekend trips, where the emphasis is either seclusion or entertainment. Most of the parents travelling without their children expressed an interest in quality - good restaurants, nice accommodations, and either gorgeous scenery or lively entertainment and good shopping.

Some group members plan trips around an event, such as the Calgary Stampede; or to cater to specific interests satisfied by a destination's geography, landmarks or architecture. Several respondents expressed interest in historical landmarks, mining, Indian culture or "educational" sights for their children.

Others plan vacations around an interest in skiing or fishing, or solely for the purpose of spending time in the sun.

When asked to describe vacation destinations to which they would not return, respondents mentioned bad weather, expense, poverty and filth (Mexico) and unpleasant driving on bad roads.

Respondents learn about new destinations primarily by word of mouth. If their friends or relatives have had a good experience at a particular destination, they tend to be motivated to travel there themselves.

Many group members read the travel section of the newspaper, and look for ideas there. Some read "Sunset" or other travel magazines. Others receive auto club publications, or read books and travel brochures. A small minority consult with travel agents for ideas.

When asked to comment on package tours, most responded negatively. The term "package tour" implied a controlled event, in which travellers were bussed from place to place and required to conform to a schedule over which they had little control. Some parents indicated that packages were too expensive because they treated children as adults. These respondents expressed a preference for planning their own schedules, and coming and going as they wished.

Most of those who responded favorably to mention of package tours had themselves travelled on one in the past. They found a package tour economical, and enjoyed the organized approach to tourism. Some indicated that package tours were good for senior citizens and women travelling alone, providing company and assistance.

Some of these same individuals also expressed an interest in a cruise, during which everything would be taken care of for them. They liked the prospect of a "hassle-free" vacation, and the opportunity to see different places and enjoy a variety of activities without driving or otherwise travelling around. These respondents tended to be older and most likely to travel to the same destinations every year. They are also those for whom travel expense tends to be a concern.

When asked about planning for trips, most respondents said they go away for a weekend at a moment's notice - a few days ahead at most, and generally hours ahead of departure.

Longer trips are planned from several months to one year in advance. Most long-term planning is from 3-6 months in advance. Respondents generally arrange flights in advance, often through travel agents. Agents occasionally make lodging arrangements, as well, although satisfaction here was mixed.

A number of respondents call or send away for literature when planning a trip to a new destination. Several indicated that they buy books on a new area, particularly if they don't know anyone who lives there or who has travelled there before.

Group members appear to recall destination advertising in proportion to their own travel experiences. Group I members recalled a wide variety of destination advertising, from New Zealand, Denmark and the "Holy Land" to Reno, Hawaii and Mexico.

Among Group II and III members, destination advertising recall was generally limited to Reno, Hawaii and Mexico, in addition to Disneyland and some specific ski areas.

B.C. Awareness and Experience

All of the participants in Groups I and II had been to British Columbia in the past. Among Group I members (been and plan to go again), most had last visited within the past year. Group II participants (been and do not plan to go again) were most likely to have had last visited B.C. two or more years ago, and many had not been back for ten or more years.

Most B.C. travellers primarily visited Vancouver and/or Victoria. Several Group I members also mentioned Harrison Hot Springs. Others, primarily in Group I, mentioned parts of Vancouver Island, the Canadian Rockies, Hwy 101 to Lund, Penticton, Whistler and Garibaldi and Banff-Louise (in Alberta).

GROUP I - Group I participants, with the broadest experience in B.C., gave a variety of reasons for visiting. They described Vancouver in terms of Stanley Park, Gastown, restaurants, plays, places to take children, cosmopolitan atmosphere, lively nightlife, English/Scottish culture and beautiful architecture. They also mentioned friendly people and a feeling of safety, as well as cleanliness. Several referred to traffic snarls.

Group I recollections of Victoria include the ferry ride, sightseeing, and a foreign flavor. They said Victoria "folds up" at night and on Sundays, that it is quiet and not as cosmopolitan as Vancouver. They mentioned museums, bicycling, walking and lots for children to do.

These respondents generally agreed that the exchange rate is a positive factor, although most said they would travel to B.C. without a favorable exchange rate. While some felt it was an incentive to spend more, others felt that prices, particularly in Victoria, were high enough so that the exchange benefit was offset.

When asked why they travel to B.C., Group I respondents most often mentioned friendly people and the sense of being in a foreign country. While Seattle residents mentioned that B.C.'s close proximity is part of its appeal, several from Portland said the drive to Vancouver was boring.

These repeat visitors are satisfied with the availability of activities in B.C., both in the cities and in the country. They mentioned good camping and fishing, and clean parks. When asked how they learned what to do in B.C., Seattle respondents mentioned word-of-mouth as their primary source of information. Others in both markets recalled information on the ferries or at the border.

Opinions about service in B.C. were mixed. Some respondents had good experiences in Victoria but not in Vancouver, while for others the situation was reversed. Similarly, some were generally satisfied with accommodations, both availability and cost, while others had difficulty finding accommodations they could afford.

Group I members generally agreed that weather was no obstacle. Most were willing to travel to B.C. in the winter.

They find the scenery there to be similar to what they find at home; yet "closer," cleaner, and more natural. Respondents from both Seattle and Portland mentioned a difference in weather patterns in B.C., including less rain (Portland) and more snow (both).

GROUP II - Respondents in Group II (been to B.C. and do not plan to go again) have a narrower recollection of B.C. They mentioned Buchart Gardens, museums and the ferries in regard to Victoria; and the Empress Hotel, Stanley Park and Chinatown in Vancouver. Most of their experience was limited to these two cities, although several had been to Harrison Hot Springs, north on Vancouver Island or to Eastern B.C.

Some of these respondents indicated that they would like to go back to one of the two cities, although they couldn't say why they had not returned to date. Several mentioned problems with Vancouver traffic and finding their way around. Others felt Vancouver is just another big city, and not worth the trip.

Some Group II members indicated that in their previous visits they had seen all there was to see, and that they preferred to go elsewhere. Another portion of the group have not returned because they don't know what to do there. Several Seattle respondents indicated that no one they know ever talks about things to do there.

Group II respondents described Victoria as quaint and British, but several complained about crowded ferries and limited access. Vancouver seems to most like other large cities, although some felt it was more cosmopolitan and cleaner. Several found people there to be unfriendly.

Many were dissatisfied with accommodations in Vancouver and Victoria, finding them scarce and/or too expensive. They generally felt the favorable exchange rate was offset by higher prices. Several respondents had difficulty finding entertainment at night, saying establishments closed early.

The climate in B.C. was perceived as similar to Portland and Seattle, including cold and damp. Several Portland respondents indicated that they preferred to travel to some place warmer, like Southern Oregon. Group II members liked the scenery, describing it as green and relatively undeveloped, with mountains "closer" than at home. Several Seattle respondents were unimpressed, finding little differences from home.

GROUP III - These respondents have not been to B.C. When asked whether or not they would like to visit, most responded positively.

Those who do not want to go indicated that they had not heard anything about B.C. and had no reason to go.

Of those who indicated an interest in travelling to B.C., most had heard about Vancouver or Victoria from friends or relatives. They have heard that it is beautiful, and expressed an interest in seeing the Buchart Gardens. They have an impression of Victoria as quaint and old fashioned, but some are afraid it is a "tourist trap" and overpriced.

Vancouver strikes most as "just another big city" and not at all unusual.

Some of these respondents had moved fairly recently to the Northwest, and either knew very little about B.C. or felt they had plenty of places to visit close by before they travelled further north. Going to B.C. does not occur to them.

When asked what would encourage them to visit B.C., most Group III respondents said they needed more information. A number were familiar only with the Buchart Gardens and, particularly in Portland, needed to know more to justify a trip.

Several respondents worried about needing to schedule a ferry trip to get to Victoria. They mentioned having difficulty getting on the ferry, or not knowing the ferry schedule. This made Victoria a less attractive destination than other spots not requiring ferry travel.

Some Group III members indicated that other members of their families were not interested in travelling to a new vacation spot. Some with small children felt B.C. would not be an appropriate destination until the children were older.

When asked to describe an ideal vacation of any type, most respondents preferred a one-to-two week, summer vacation, looking at scenery or finding "lots to do" somewhere. They were not able to specify places or activities, for the most part.

Preconceptions about British Columbia included a notion of friendly people, particularly outside of Vancouver; cold, damp climate; similar scenery to Portland and Seattle, including forests and mountains; historical remnants of pioneers and Indians; and superior skiing and fishing. Expectations regarding the exchange rate were mixed, with some predicting lower prices and others assuming prices were higher.

Many respondents felt that camping in B.C. would not be worth the drive. They assumed the experience would be similar to one available in the States, and that the drive was not worthwhile. When asked how they felt about an auto tour with a theme, such as mining towns or Indian villages, most respondents expressed interest. They particularly liked the idea that they would have an agenda, of sorts.

B.C. Destination Advertising Recall

Participants in all groups were asked to recall any advertising they had seen or heard for British Columbia.

Group I respondents recalled the most, including not only the Canada advertising (Borders on the Magnificent) but also the Super Natural theme (Seattle), billboards for Buchart Gardens, ads for Whistler and Garibaldi, scenes of the Empress Hotel, Sunset magazine ads, mentions of the exchange rate, and reference in the Oregonian Sunday Supplement. In Seattle, recall of the Super Natural campaign was particularly vivid, with reference to the music and scenery as well as the slogan.

Fewer Group II respondents remembered B.C. advertising, although a brochure for a hotel in Victoria, Princess Marguerite billboards and an ad for Expo in Sunset were recalled, along with TV commercials for Molson beer.

Several Group III members recalled seeing billboards for Buchart Gardens, as well as magazine ads for the Canadian Rockies. A few remembered the "Borders on the Magnificent" and "Come On Up" themes.

Respondents were then shown a selection of B.C. destination print advertising in seasonal clusters. Most were not familiar with them, although some Seattle consumers in Groups I and II recalled the theme.

These ads were generally seen as appealing - "fresh," "clean," "rugged and unspoiled" were commonly used adjectives. Skiers and fishermen among the group members found related pictures appealing.

Group I members felt the print ads generally matched their experiences in B.C. Other respondents had two prominent criticisms: that the scenes represented could have been another city or countryside, closer to home or anywhere; and that the ads did not represent a vacation opportunity, or "handle," with which respondents could pursue vacation planning.

They suggested showing a lodge in the fishing scene, for example, with an address and phone number to call. They wanted to know where the scenes were, on the map or relative to Vancouver or another place they recognized. Locations represented in the ads were not sufficiently differentiated from points in Portland or Washington, to warrant investigation.

Some respondents in Groups II and III objected to the phrase "Call your travel agent." These consumers do not have or use travel agents for the most part, which places the opportunity illustrated out of their reach.

Many Group II and III members were put off by the winter scenes, finding representations of cold and damp or greyness too much like winter at home to be appealing. Some had never seen any pictures of B.C. before, and their interest was piqued.

Seattle respondents were shown videos of four B.C. destination ads with the Super Natural theme. Most Group I members had seen one or more before, while most in Groups II and III had not.

Some respondents liked the ads, saying they made them want to go fish or ski, but most who viewed the ads indicated that the scenes could have been taken in the States, and that British Columbia as part of a different country should have been stressed. Primarily, respondents said the ads should be more specific in mentioning place names and activities. The commercials gave no specific reasons to go, nor did they enable the viewer to act based on information received in the viewing.

Several respondents indicated that they didn't trust beautiful scenery in the absence of specific information, because they felt they would not be able to recreate the experience themselves on a trip. Those who were not inspired by the ads to go to B.C. said they needed more information.

Hypothetical Package Tours

Finally, each of the participants was asked to create an ideal package trip to British Columbia, including accommodation, meals, activities and/or such other elements as (s)he chose. Again, repeat visitors to B.C. were able to envision a wider variety of specialized trips than were one-time visitors, and non-visitors were harder pressed still.

Most respondents described visits of 2-4 days. Seattle respondents wanted to drive up, while most from Portland preferred to fly for this length of time. Group I members more often included Vancouver or Victoria in their plans, while those less familiar with B.C. seemed to prefer a trip into the wilderness.

City packages usually included room and breakfast, or breakfast and lunch. Many respondents asked for a tour, or other transportation, theatre tickets, dinner and dancing or shows, passes to museums or the aquarium, or some other combination of activities or events included in the package.

Trips out of town most often included food and lodging, transportation "in" to the destination resort, and accommodation for fishing, boating, hiking or some other outdoor recreation. The prospect of being flown into a resort location from Vancouver was particularly appealing. Many of those preferring a vacation away from civilization indicated an interest in having a variety of activity opportunities available in some otherwise isolated location.

The common element, here as before, is knowledge of opportunities available at a vacation destination.